City of San Marcos

630 East Hopkins
San Marcos, TX 78666

Work Session - Final

City Council

Tuesday, February 5, 2019 | **3:00 PM** | **City Hall Conference Room**

630 E. Hopkins - Work Session

I. Call To Order

II. Roll Call

PRESENTATIONS

1. Receive a Visioning Workshop recap presentation, and hold discussion, regarding the previously adopted Fiscal Year 2018-2019 Priorities and finalize Fiscal Year 2019-2020 Priorities, and provide direction to the City Manager.

2. Receive a presentation and hold discussion on the Coordinated Transit Plan Phase II, and provide direction to Staff.

III. Adjournment.

POSTED ON THURSDAY, JANUARY 31, 2019 @ 12:00PM

JAMIE LEE CASE, TRMC, CITY CLERK

Notice of Assistance at the Public Meetings

The City of San Marcos does not discriminate on the basis of disability in the admission or access to its services, programs, or activities. Individuals who require auxiliary aids and services for this meeting should contact the City of San Marcos ADA Coordinator at 512-393-8000 (voice) or call Texas Relay Service (TRS) by dialing 7-1-1. Requests can also be faxed to 855-461-6674 or sent by e-mail to ADArequest@sanmarcostx.gov

Legislation Text

File #: ID#18-958, **Version:** 1

AGENDA CAPTION:

Receive a Visioning Workshop recap presentation, and hold discussion, regarding the previously adopted Fiscal Year 2018-2019 Priorities and finalize Fiscal Year 2019-2020 Priorities, and provide direction to the City Manager.

Meeting date: February 5, 2019

Department: City Manager's Office

Amount & Source of Funding

Funds Required: N/A

Account Number: Click or tap here to enter text.

Funds Available: Click or tap here to enter text.

Account Name: Click or tap here to enter text.

Fiscal Note:

Prior Council Action: Click or tap here to enter text.

City Council Strategic Initiative: [Please select from the dropdown menu below]

Choose an item.

Choose an item.

Choose an item.

Comprehensive Plan Element (s): [Please select the Plan element(s) and Goal # from dropdown menu below]

☐ Economic Development - Choose an item.

☐ Environment & Resource Protection - Choose an item.

☐ Land Use - Choose an item.

☐ Neighborhoods & Housing - Choose an item.

☐ Parks, Public Spaces & Facilities - Choose an item.

☐ Transportation - Choose an item.

☐ Not Applicable

Master Plan: *[Please select the corresponding Master Plan from the dropdown menu below (if applicable)]*

Choose an item.

Background Information:

The City Council held their annual Visioning Workshop on January 11, 2019 with Ms. Robena Jackson of Group Solutions RJW. The Council's FY 19-20 Strategic Initiatives are below along with their previous initiatives for FY18-19.

FY 18-19 Adopted Strategic Initiatives

- Workforce Housing
- Public Transit
- Stormwater Management
- Community Partnerships
- City Facilities

FY 19-20 Draft Strategic Initiatives

- Workforce Housing
- Multi Modal Transportation
- Workforce Development
- Downtown Vitalization
- City Facilities

Council Committee, Board/Commission Action:

Click or tap here to enter text.

Alternatives:

Click or tap here to enter text.

Recommendation:

Click or tap here to enter text.

SANMARCOS

City Council Work Session

2019 Strategic Initiatives

February 5, 2019

❖ *Key Priorities with Strategic Initiatives*

1. *Workforce Housing*
2. *Multi Modal Transportation*
3. *City Facilities*
4. *Workforce Development*
5. *Downtown Vitalization*

Workforce Housing

Strategies:

A. *Update, consolidate and communicate housing policies and action plans.*

B. *Develop dedicated housing and revenue sources that meet goals.*

   - *Establish an Emergency Housing Rehabilitation Program.*

C. *Implement land use and zoning regulations that support diverse, mixed income communities in all areas of the City.*

Multi Modal Transportation

~~Public Transit~~

Strategies:

A. *City becomes the Direct Recipient for federal and state transit funding allocated to the San Marcos urbanized area.*

B. *City reviews the benefits and challenges of creating an integrated, seamless transit partnership between the City and Texas State University.*

C. *<u>City continues other multi modal initiatives.</u>*

City Facilities

Strategies:

A. *Explore short-term alternatives for staff expansion within City Hall Complex.*

B. *Review all possible alternative delivery methods for new facility construction.*

C. *Develop a 5-year Fiscal Strategic Plan for implementation of Bond Projects.*

D. *Develop Public Services, Community Services and City Hall Project Design and Scope.*

- *Identify opportunities for land and/or facility acquisitions related to all City services and programs.*

Workforce Development

Strategies:

A. Leverage and Partner with the Community.

B. Facilitate opportunities for Training and Programming.

Downtown Vitalization

Strategies:

A. *Support diversified business activity.*

B. *Take measures to improve downtown quality of place.*

C. *Accessibility to and within the downtown.*

Next Steps

- *Council final direction on Key Priorities/ Strategic Initiatives.*
- *Staff will formulate tasks, timelines, budget/resources, and other notes.*
- *Staff will bring back recommended 2019 Strategic Initiatives Plan for Council Adoption.*

Multi Modal Initiatives

A. City becomes the Direct Recipient for federal and state transit funding allocated to the San Marcos urbanized area.

Strategies:

~~I. Reach a local consensus and secure a City Council resolution authorizing the City Manager to request that the Capital Area Metropolitan Planning Organization (CAMPO) officially recognize the City as. the Direct Recipient~~

~~II. Request CAMPO provide formal concurrence by the Transportation Policy Board (TPB) of the City's Direct Recipient status and, subsequent to this action, that the CAMPO conveys such support to the attention of the Public Transit Division of the TxDOT PTN.~~

III. Formalize ~~After~~ official concurrence from TxDOT-PTN and the FTA, that the City is the Direct Recipient for the San Marcos urbanized area. All federal and state

~~IV. Transfer all~~ requirements for the Direct Recipient from CARTS to the City by October 1, 2019.~~will become the City's responsibility.~~

IV ~~V.~~ Consider the potential impacts of the 2020 Census upon transit services in the San Marcos urbanized area.

Multi Modal Initiatives

B. City reviews ~~researches~~ the benefits and challenges of creating an integrated, seamless ~~coordinated~~ ~~transit system and Interlocal Agreements~~ transit partnership between the City and Texas State University.

Strategies:

I. Review ~~explore~~ transit partnership models and select a system model to operate and manage the transit services, which that historically have been accepted by the FTA and TxDOT.

II. Assess the operating and financial alternatives for coordinated transit services.

III. Evaluate the benefits and constraints of a transit partnership with Texas State, to include:
   a. Seamless transit services for all customers.
   b. Expand community access to transit options
   c. Share capital budget resources.
   d. Coordinate transit routes to maximize efficiency.
   e. Leverage state and federal funding opportunities.
   f. Contribute to regional goals to reduce traffic and protect air quality.

IV. Evaluate the challenges of a transit partnership with Texas State, to include:
   a. Determine who will be the Direct Recipient.
   b. Create a shared governance structure.
   c. Compliance with federal and state regulations, to include paratransit services.
   d. Coordinate transit routes to maximize efficiency.
   e. Establish a financial plan to include operating funds, initial investment of capital for vehicles, maintenance facility, and passenger amenities.

V. Consider the potential impacts of the 2020 US Census upon transit services in the San Marcos urbanized area.

Multi Modal Initiatives

C. City continues other Multi Modal initiatives.

Strategies:

I. **Transportation Demand Management/ including downtown parking management**:

a. Adopt and implement parking management plan.

b. Prioritize Transportation Master Plan projects to improve multi-modal alternatives.

c. Evaluate and prioritize other transportation demand management tactics.

II. **Improve Bicycle Friendly Community rating**:

a. Improve and expand dockless bike share program and explore other shared mobility opportunities.

b. Revisit Complete Streets policy and propose changes for Council consideration.

c. Draft Vision Zero policy for Council consideration.

d. Consider creation of a Bicycle & Pedestrian Advisory Committee.

e. Adopt and implement bicycle master plan.

Multi Modal Initiatives *continued*

III. Improve pedestrian connectivity and accessibility:

a. Conduct updated assessment of existing sidewalk infrastructure.

b. Conduct gap analysis and identify/prioritize needed connections to multimodal facilities, transit stops, schools, neighborhoods, hike-bike trails, and east-west connections.

c. Develop and adopt Sidewalk Master Plan.

d. Identify and implement short-term maintenance and gap improvements.

e. Identify and program long-term pedestrian improvements.

f. Conduct site survey sampling for ADA compliance.

g. Continue utilizing external sources to confirm ADA compliance and staff training.

IV. Other regional transit:

a. Evaluate the benefits of regional transit partnerships with interurban providers including multimodal transit facility options.

b. Explore light rail, AMTRAK, and other future transit opportunities.

c. Explore options for a downtown circulator, including all alternative fuel/vehicle options.

V. Pursue multi modal funding opportunities.

Workforce Development Initiatives

A. Leverage and Partner with the Community.

Strategies:

I. Identify current assets including partners, existing services, possible locations, and organizational purpose. Include mapping of assets and services within the City.
II. Identify community partner to anchor a cradle to career initiative.
III. Identify and develop outreach opportunities.
IV. Identify challenges and unmet needs in the business community that are impacted by workforce development.

B. Facilitate opportunities for Training and Programming.

Strategies:

I. Identify and communicate existing training available.
II. Identify potential gaps and barriers for San Marcos residents.
III. Identify potential items to include when incentivizing economic development agreements.
IV. Evaluate Greater San Marcos Partnership (GSMP) contract to include deliverables that require training and programming opportunities.
IV. Determine where to invest city funding to mitigate gaps and barriers that have been identified including a possible training location.

Downtown Vitalization Initiative

A. Support diversified business activity.

Strategies:

I. Begin a revised Downtown Master Plan including, the innovation, cultural and arts districts

a. Scope and Visioning Exercise with district Stakeholders and City Council.

b. Request for Proposal (RFP) and Contract for consultant.

c. Public outreach with key stakeholders including the Downtown Association, Main Street, the University, as well as other key stakeholders.

d. Drafting and adopting the Downtown Master Plan.

II. Review permitted and conditional uses in the downtown area.

a. Identify potential code amendments during the annual code update process.

b. Explore other modifications to alcohol Conditional Use Permits (CUP) related ordinances.

c. Discuss bar service hours with the Council CUP Committee.

III. Define goals and objectives for the Main Street program.

a. Review current goals and objectives within the Four Point approach of (1- Economic Vitality, 2-Design, 3- Organization, and 4-Promotion).

b. Develop a strategy for transformation of Downtown along the Four Points.

c. Define quantifiable outcomes for the transformation strategies identified.

d. Align organizational resources to achieve desired outcomes through the budget process.

Downtown Vitalization *Continued*

B. Take measures to improve downtown quality of place.

Strategies:

I. Review and assess possible sites and facilities which could promote San Marcos as a destination.

II. Review and address underground electric ordinances.

a. Feasibility and cost analysis.

b. Identify code amendments during the annual code update process.

III. Review and assess strategies for vacant and neglected buildings.

a. Review model programs and identify resources needed for implementation.

b. Propose code amendments during the annual code update process.

IV. Identify strategic locations for streetscape and infrastructure improvements and identify funding options.

a. Define departmental roles and responsibilities with regard to design, construction, operation and maintenance of downtown streetscape and infrastructure improvements.

b. Develop an interim maintenance and beautification plan and coordinate efforts amongst stakeholders.

c. Explore the long-term solutions for beautification and maintenance including a downtown management district with downtown stakeholders.

d. Align organizational resources to achieve desired outcomes through the budget process.

V. Review and amend the Downtown Tax Increment Reinvestment Zone (TIRZ) #5.

a. Convene the TIRZ Board to consider pending funding request for Cheatham Street Flats project.

b. Ensure previously approved project (Crossroads/Justice Center) is completed, in conjunction with TxDOT and COSM improvements to Guadalupe Street.

c. Prepare a revised Project & Finance Plan for Board consideration and approval.

d. Present revised Project & Finance Plan for Council and Commissioner's Court consideration.

Downtown Vitalization *Continued*

C. Accessibility to and within the downtown.

Strategies:

I. Complete the San Marcos River Bike and Pedestrian Trail project.

a. Finalize design.

b. Letting of Project – TXDOT.

II. Approve and implement the Parking Management Plan.

a. Hire Parking & Mobility Manager.

b. Parking Advisory Board orientation, bylaws and work plan.

c. Procure parking management technology (meters & mobile app).

d. Create program branding and marketing campaign.

e. Initiate phased rollout of on-street paid parking.

f. Negotiate off-street parking agreements with private property owners and facilitate options.

- *Staff will continue to prioritize work around Stormwater and Community Partnerships moving forward.*
- *Staff will work towards Year of the City.*

Key Priorities:

The Strategic Initiatives identified by the Council during the Visioning Meeting in January 2019 focus around the following key priorities:

- Workforce Housing
- Multi Modal Transportation
- City Facilities
- Workforce Development
- Downtown Vitalization

Strategic Initiatives

Key Priority: **Workforce Housing**

A. Update, consolidate and communicate housing policies and action plans.

Strategies:

I. Conduct a housing study that analyzes housing supply, housing demand, and housing choice.
II. Update the Affordable Housing Policy and adopt a housing framework / blueprint based on the work of the San Marcos Workforce housing Task Force.
III. Maintain a robust website and participate as a community partner in advancing the City's housing goals.
IV. Develop internal city capacity and support capacity building efforts in community partners to advance the City's housing goals. Work with local employers such as Texas State University, San Marcos ISD, Hays County, Central Texas Medical Center, the banking community, the Greater San Marcos Partnership and area non-profits to identify and implement housing solutions.

B. Develop dedicated housing and revenue sources that meet goals.

Strategies:

I. Build permanently affordable homes targeted to flood victims on city-owned lots with CDBG-DR funds.
II. Apply for HOME funds. Utilize CDBG funds to preserve and maintain for households earning less than 80% AMI through the Housing Rehabilitation Program.
IV. Lend CDBG first-time homebuyer funds to households earning less than 80% AMI to purchase housing.
V. Enter into cooperative agreements with other taxing entities to identify tax-forfeiture properties and make them available for construction of permanently affordable workforce housing.
VI. Establish a land bank and community land trust with the purpose of supporting permanently affordable workforce housing.
VII. Establish an Emergency Housing Rehabilitation Program.

C. Implement land use and zoning regulations that support diverse, mixed income communities in all areas of the City.

Strategies:

I. Encourage mixed income communities within new development.
II. Monitor the bonus density program for effectiveness and re-assess during the annual code update.
III. Monitor the number of new missing middle housing types built under Code SMTX and re-assess during the annual Code update.
IV. Draft an ordinance targeting geographic locations and non-profit home builders for appropriate zoning when permanently affordable for sale housing is constructed.

Key Priority: **Multi-Modal Transportation**

A. City becomes the Direct Recipient for federal and state transit funding allocated to the San Marcos urbanized area.

Strategies:

I. Formalize official concurrence from TxDOT-PTN and the FTA, that the City is the Direct Recipient for the San Marcos urbanized area.
II. Transfer all federal and state requirements for the Direct Recipient from CARTS to the City by October 1, 2019.
III. Consider the potential impacts of the 2020 Census upon transit services in the San Marcos urbanized area.

B. City reviews the benefits and challenges of creating a coordinated transit system and Interlocal Agreements between the City and Texas State University.

Strategies:

I. Review transit partnership models and select a system model to operate and manage the transit services, which historically have been accepted by the FTA and TxDOT.
II. Assess the operating and financial alternatives for coordinated transit services.
III. Evaluate the benefits and constraints of a transit partnership with Texas State, to include:
    a. Seamless transit services for all customers.
    b. Expand community access to transit options
    c. Share capital budget resources.
    d. Coordinate transit routes to maximize efficiency.
    e. Leverage state and federal funding opportunities.
    f. Contribute to regional goals to reduce traffic and protect air quality.
IV. Evaluate the challenges of a transit partnership with Texas State, to include:
    a. Determine who will be the Direct Recipient.
    b. Create a shared governance structure.
    c. Compliance with federal and state regulations, to include paratransit services.
    d. Coordinate transit routes to maximize efficiency.
    e. Establish a financial plan to include operating funds, initial investment of capital for vehicles, maintenance facility, and passenger amenities.
V. Consider the potential impacts of the 2020 US Census upon transit services in the San Marcos urbanized area.

C. City continues other multi-modal initiatives.

Strategies:

I. Transportation Demand Management/ including downtown parking management:
    a. Adopt and implement parking management plan.
    b. Prioritize Transportation Master Plan projects to improve multi-modal alternatives.
    c. Evaluate and prioritize other transportation demand management tactics.
II. Improve Bicycle Friendly Community rating:
    a. Improve and expand dockless bike share program and explore other shared mobility opportunities.
    b. Revisit Complete Streets policy and propose changes for Council consideration.
    c. Draft Vision Zero policy for Council consideration.
    d. Consider creation of a Bicycle & Pedestrian Advisory Committee.
    e. Adopt and implement bicycle master plan.
III. Improve pedestrian connectivity and accessibility:

a. Conduct updated assessment of existing sidewalk infrastructure.
b. Conduct gap analysis and identify/prioritize needed connections to multimodal facilities, transit stops, schools, neighborhoods, hike-bike trails, and east-west connections.
c. Develop and adopt Sidewalk Master Plan.
d. Identify and implement short-term maintenance and gap improvements.
e. Identify and program long-term pedestrian improvements.
f. Conduct site survey sampling for ADA compliance.
g. Continue utilizing external sources to confirm ADA compliance and staff training.

IV. Other regional transit:
a. Evaluate the benefits of regional transit partnerships with interurban providers including multimodal transit facility options.
b. Explore light rail, AMTRAK, and other future transit opportunities.
c. Explore options for a downtown circulator, including all alternative fuel/vehicle options.

V. Pursue multi-modal funding opportunities.

Key Priority: **City Facilities**

A. Explore short-term alternatives for staff expansion within City Hall Complex.

Strategies:

I. Determine 3-4 year staff growth potential for current City Hall Services.
II. Examine possible facility expansion alternatives to current City Hall campus, which could include temporary portable facilities.
III. Examine potential for possible short-term facility lease.
IV. Explore possible City Hall parking alternatives.

B. Review all possible alternative delivery methods for new facility construction.

Strategies:

I. Identify advantages and disadvantages of alternative delivery methods for City facility related projects.
II. Provide education materials to City staff and City Council on the alternative delivery methods.
III. Hire experienced project manager to implement those alternatives.
IV. Evaluate the success or issues related to each delivery method used by the City.

C. Develop a 5-year Fiscal Strategic Plan for implementation of Bond Projects.

Strategies:

I. Develop design and construction schedules for all facility projects.
II. Develop cost and time tracking system for all facility projects.
III. Develop Citizen Bond Review Committee that will meet periodically to review projects.
IV. Provide quarterly updates to Council.

D. Develop Public Services, Community Services and City Hall Project Design and Scope.

Strategies:

I. Develop RFP for Public and Community Service Maintenance Facility project.
II. Evaluate potential future alternatives for City Hall Campus.
III. Create a master plan for City Hall redevelopment.
IV. Implement strategic plan for City Hall redevelopment.

E. Explore alternatives for future land purchases for facilities.

Strategies:

I. Develop strategy for future facility site locations.
II. Build cost into 10-year CIP Projects.
III. Identify opportunities for land and/or facility acquisitions related to all City services and programs.

Key Priority: **Workforce Development**

A. Leverage and Partner with the Community.

Strategies:

I. Identify current assets including partners, existing services, possible locations, and organizational purpose. Include mapping of assets and services within the City.
II. Identify community partner to anchor this initiative.
III. Identify and develop outreach opportunities.
IV. Identify challenges and unmet needs in the business community that are impacted by workforce development.

B. Facilitate opportunities for Training and Programming.

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Key Priority: **Downtown Vitalization**

A. Support diversified business activity.

Strategies:

I. Begin a revised Downtown Master Plan including, the innovation, cultural and arts districts.
   a) Scope and Visioning Exercise with district Stakeholders and City Council.
   b) Request for Proposal (RFP) and Contract for consultant.
   c) Public outreach with key stakeholders including the Downtown Association, Main Street, the University, as well as other key stakeholders.
   d) Drafting and adopting the Downtown Master Plan.
II. Review permitted and conditional uses in the downtown area.
   a) Identify potential code amendments during the annual code update process.
   b) Explore other modifications to alcohol Conditional Use Permits (CUP) related ordinances.
   c) Discuss bar service hours with the Council CUP Committee.
III. Define goals and objectives for the Main Street program.
   a) Review current goals and objectives within the Four Point approach of (1-Economic Vitality, 2-Design, 3-Organization, and 4-Promotion).
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Strategies:

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c) Procure parking management technology (meters & mobile app).
d) Create program branding and marketing campaign.
e) Initiate phased rollout of on-street paid parking.
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g) Staff will continue to prioritize work around Stormwater and Community Partnerships moving forward.

Key Priorities:

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- Multi Modal Transportation ~~Public Transit~~
- City Facilities
- ~~Stormwater~~ Workforce Development
- Downtown Vitalization ~~Community Partners~~

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Key Priority: **Multi-Modal Transportation ~~Public Transit~~**

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~~IV.~~ ~~Transfer~~ ~~all~~ All federal and state requirements for the Direct Recipient from CARTS to the City by October 1, 2019.~~will become the City's responsibility.~~

~~V.~~IV. Consider the potential impacts of the 2020 Census upon transit services in the San Marcos urbanized area.

B. City reviews ~~researches~~ the benefits and challenges of creating an integrated, seamless ~~coordinated transit system and Interlocal Agreements~~ transit partnership between the City and Texas State University.

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II. Assess the operating and financial alternatives for coordinated transit services.

III. Evaluate the benefits and constraints of a transit partnership with Texas State, to include:

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c. Share capital budget resources.
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e. Leverage state and federal funding opportunities.
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IV. Evaluate the challenges of a transit partnership with Texas State, to include:

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c. Compliance with federal and state regulations, to include paratransit services.
d. Coordinate transit routes to maximize efficiency.
e. Establish a financial plan to include operating funds, initial investment of capital for vehicles, maintenance facility, and passenger amenities.

V. Consider the potential impacts of the 2020 US Census upon transit services in the San Marcos urbanized area.

C. City continues other multi-modal initiatives.

Strategies:

I. Transportation Demand Management/ including downtown parking management:

a. Adopt and implement parking management plan.
b. Prioritize Transportation Master Plan projects to improve multi-modal

alternatives.
   c. Evaluate and prioritize other transportation demand management tactics.
II. Improve Bicycle Friendly Community rating:
   a. Improve and expand dockless bike share program and explore other shared mobility opportunities.
   b. Revisit Complete Streets policy and propose changes for Council consideration.
   c. Draft Vision Zero policy for Council consideration.
   d. Consider creation of a Bicycle & Pedestrian Advisory Committee.
   e. Adopt and implement bicycle master plan.
III. Improve pedestrian connectivity and accessibility:
   a. Conduct updated assessment of existing sidewalk infrastructure.
   b. Conduct gap analysis and identify/prioritize needed connections to multimodal facilities, transit stops, schools, neighborhoods, hike-bike trails, and east-west connections.
   c. Develop and adopt Sidewalk Master Plan.
   d. Identify and implement short-term maintenance and gap improvements.
   e. Identify and program long-term pedestrian improvements.
   f. Conduct site survey sampling for ADA compliance.
   g. Continue utilizing external sources to confirm ADA compliance and staff training.
IV. Other regional transit:
   a. Evaluate the benefits of regional transit partnerships with interurban providers including multimodal transit facility options.
   b. Explore light rail, AMTRAK, and other future transit opportunities.
   c. Explore options for a downtown circulator, including all alternative fuel/vehicle options.
V. Pursue multi-modal funding opportunities.

Key Priority: **City Facilities**

A. Explore short-term alternatives for staff expansion within City Hall Complex.

Strategies:

I. Determine 3-4 year staff growth potential for current City Hall Services.
II. Examine possible facility expansion alternatives to current City Hall campus, which could include temporary portable facilities.
III. Examine potential for possible short-term facility lease.
IV. Explore possible City Hall parking alternatives.

B. Review all possible alternative delivery methods for new facility construction.

Strategies:

I. Identify advantages and disadvantages of alternative delivery methods for City facility related projects.
II. Provide education materials to City staff and City Council on the alternative delivery methods.
III. Hire experienced project manager to implement those alternatives.
IV. Evaluate the success or issues related to each delivery method used by the City.

C. Develop a 5-year Fiscal Strategic Plan for implementation of Bond Projects.

Strategies:

I. Develop design and construction schedules for all facility projects.
II. Develop cost and time tracking system for all facility projects.
III. Develop Citizen Bond Review Committee that will meet periodically to review projects.
IV. Provide quarterly updates to Council.

D. Develop Public Services, Community Services and City Hall Project Design and Scope.

Strategies:

I. Develop RFP for Public and Community

Service Maintenance Facility project.
II. Evaluate potential future alternatives for City Hall Campus.
III. Create a master plan for City Hall redevelopment.
IV. Implement strategic plan for City Hall redevelopment.

E. Explore alternatives for future land purchases for facilities.

Strategies:

I. Develop strategy for future facility site locations.
II. Build cost into 10-year CIP Projects.
III. Identify opportunities for land and/or facility acquisitions related to all City services and programs.

Key Priority: **Workforce Development** ~~Community Partners~~

A. Leverage and Partner with the Community.

Strategies:

I. Identify current assets including partners, existing services, possible locations, and organizational purpose. Include mapping of assets and services within the City.
II. Identify community partner to anchor a cradle to career initiative.
III. Identify and develop outreach opportunities.
IV. Identify challenges and unmet needs in the business community that are impacted by workforce development.

B. Facilitate opportunities for Training and Programming.

Strategies:

I. Identify and communicate existing training available.
II. Identify potential gaps and barriers for San Marcos residents.
III. Identify potential items to include when incentivizing economic development agreements.
IV. Evaluate Greater San Marcos Partnership (GSMP) contract to include deliverables that require training and programming opportunities.
V. Determine where to invest city funding to mitigate gaps and barriers that have been identified including a possible training location.

Key Priority: **Downtown Vitalization** ~~Stormwater~~

A. Support diversified business activity.

Strategies:

I. Begin a revised Downtown Master Plan including, the innovation, cultural and arts districts.
   a) Scope and Visioning Exercise with district Stakeholders and City Council.
   b) Request for Proposal (RFP) and Contract for consultant.
   c) Public outreach with key stakeholders including the Downtown Association, Main Street, the University, as well as other key stakeholders.
   d) Drafting and adopting the Downtown Master Plan.
II. Review permitted and conditional uses in the downtown area.
   a) Identify potential code amendments during the annual code update process.
   b) Explore other modifications to alcohol Conditional Use Permits (CUP) related ordinances.
   c) Discuss bar service hours with the Council CUP Committee.
III. Define goals and objectives for the Main Street program.
   a) Review current goals and objectives within the Four Point approach of (1-

Economic Vitality, 2-Design, 3-Organization, and 4-Promotion).
b) Develop a strategy for transformation of Downtown along the Four Points.
c) Define quantifiable outcomes for the transformation strategies identified.
d) Align organizational resources to achieve desired outcomes through the budget process.

B. Take measures to improve downtown quality of place.

Strategies:

I. Review and assess possible sites and facilities which could promote San Marcos as a destination.
II. Review and address underground electric ordinances.
   a) Feasibility and cost analysis.
   b) Identify code amendments during the annual code update process.
III. Review and assess strategies for vacant and neglected buildings.
   a) Review model programs and identify resources needed for implementation.
   b) Propose code amendments during the annual code update process.
IV. Identify strategic locations for streetscape and infrastructure improvements and identify funding options.
   a) Define departmental roles and responsibilities with regard to design, construction, operation and maintenance of downtown streetscape and infrastructure improvements.
   b) Develop an interim maintenance and beautification plan and coordinate efforts amongst stakeholders.
   c) Explore the long-term solutions for beautification and maintenance including a downtown management district with downtown stakeholders.
   d) Align organizational resources to achieve desired outcomes through the budget process.
V. Review and amend the Downtown Tax Increment Reinvestment Zone (TIRZ) #5.
   a) Convene the TIRZ Board to consider pending funding request for Cheatham Street Flats project.
   b) Ensure previously approved project (Crossroads/Justice Center) is completed, in conjunction with TxDOT and COSM improvements to Guadalupe Street.
   c) Prepare a revised Project & Finance Plan for Board consideration and approval.
   d) Present revised Project & Finance Plan for Council and Commissioner's Court consideration.

C. Accessibility to and within the downtown.

Strategies:

I. Complete the San Marcos River Bike and Pedestrian Trail project.
   a) Finalize design.
   b) Letting of Project – TXDOT.
II. Approve and implement the Parking Management Plan.
   a) Hire Parking & Mobility Manager.
   b) Parking Advisory Board orientation, bylaws and work plan.
   c) Procure parking management technology (meters & mobile app).
   d) Create program branding and marketing campaign.
   e) Initiate phased rollout of on-street paid parking.
   f) Negotiate off-street parking agreements with private property owners and facilitate options.

- *Staff will continue to prioritize work around Stormwater and Community Partnerships moving forward.*
- *Staff will work towards "Year of the City".*

City of San Marcos City Council Visioning Work Session
January 11, 2019

Strategic Priorities Agreed to By Council

The following five strategic priorities were agreed to by Council:

1. Workforce Housing

A. Discussion
- Establish emergency housing rehab
- Prevent displacement
- Long term affordability
- Home ownership

B. Council agreed on the following outcomes for 2019:
- Existing three outcomes

2. Multi Model Transportation

A. Discussion
- Explore a circulator
- Explore commuter rail
- Transportation Demand Management
- Downtown parking management
- Seek to extend funding
- Transportation
  - Vision Zero
  - Bike routes/Pedestrian access to key points
  - Transportation HUB
  - Bridge over Purgatory Creek
- Connectivity of sidewalks
  - Underneath intersection
  - Between East to West
  - Crosstown pathways
  - Greenways Plan

B. Council agreed on the following outcomes for 2019:
- NOTE: Council agreed that the City Manager will draft these outcome for Council feedback and agreement

3. City Facilities

A. Council agreed the following outcomes for 2019:
- Existing three outcomes
- Adding a fourth new outcome: Identify opportunities for land and/or facility acquisition

4. Downtown

A. Discussion
- Police substation
- No more bars
- Be mindful of effects on neighbors
- Height limits
- Diversified housing
- Family appeal
- Strategic Plan
- Drinking in alleys (no open container after 10 pm)
- Visually appealing store fronts
- Dress up vacancies
- Activate public spaces for community building
- Main street – econ vitality, design, promotion, organization
- Increase parking
- Parking solutions
- Traffic/Accessibility
- Live workplace
- Incomplete sidewalks
- Retail locally-owned
- Revitalize downtown
- Recruit businesses
- Business support and commerce plan
- Opposing irresponsible developments in our city
- Responsible development
- Partnership with actual people in neighborhoods
- Connect downtown to river

B. Council agreed on following outcomes for 2019:
- Increase retail, offices and vitality
  - Identify and minimize barriers
  - Activate public spaces
- Increase visual appeal
  - The look and feel of downtown
- Improve connectivity between downtown and the river
  - Appealing, walkable with art between downtown and river
- Grow and diversity housing stock
- Develop plan to accommodate growth
  - Parking

5. Workforce Development

A. Discussion
- Attention to the 14-24 age group

    - For GED
    - For programs
- Develop cradle to workforce pipeline
- Look at SMISD and University
- Facility on east side of city
- Partnering and leveraging
- Support SVS
    - Transportation daycare
    - Illiteracy
- Inventory of existing resources (ex. Hands of Hope, Mental Health Community, and social services) Asset mapping – what is already in place

B. Council agreed on the following outcomes for 2019:
    - Leverage and partner with existing organizations
        - Find out what is already existing
        - Determine where to invest limited city money
        - Partner
        - Determine organizations with existing initiatives
    - Facilitate opportunities for job training for San Marcos residents
        - Resource center
        - East side training facility
    - Incentivize the hiring of local residents as well as advancement opportunities

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Legislation Text

File #: ID#18-962, **Version:** 1

AGENDA CAPTION:
Receive a presentation and hold discussion on the Coordinated Transit Plan Phase II, and provide direction to Staff.
Meeting date: February 5, 2019

Department: Community Services

Amount & Source of Funding
Funds Required: N/A
Account Number: Click or tap here to enter text.
Funds Available: Click or tap here to enter text.
Account Name: Click or tap here to enter text.

Fiscal Note:

Prior Council Action: Click or tap here to enter text.

City Council Strategic Initiative: [Please select from the dropdown menu below]

Public Transit

Choose an item.

Choose an item.

Comprehensive Plan Element (s): [Please select the Plan element(s) and Goal # from dropdown menu below]

☐ Economic Development - Choose an item.

☐ Environment & Resource Protection - Choose an item.

☐ Land Use - Choose an item.

☐ Neighborhoods & Housing - Choose an item.

☐ Parks, Public Spaces & Facilities - Choose an item.

☐ Transportation - Choose an item.

☒ Not Applicable

Master Plan: *[Please select the corresponding Master Plan from the dropdown menu below (if applicable)]*

Choose an item.

Background Information:

- City council directed staff to initiate the Coordinated Transit Plan Study (CTP), a collaborative effort of the City and Texas State University
- City council directed staff to utilize a two phase approach, with CTP Phase I to recommend the Direct Recipient of the San Marcos urbanized area
- Following CTP Phase I recommendations, City Council voted to become the Direct Recipient of federal and state transit funds for the San Marcos small urbanized area
- City staff is coordinating the transfer of the roles and responsibilities of the Direct Recipient from the Capital Area Rural Transportation System (CARTS) to the City with October, 1 2019 as the date for full transition.
- CTP Phase II to provide recommendations for the City/University to create a seamless transit system with greater access for all citizens
- CTP Phase II to explore best practice coordinated transit models to include:
    - Benefits and challenges of a coordinated transit system
    - Recommendations for coordinated transit system operations, governance, and federal compliance
    - Adequate timing for transition to a coordinated transit system

Council Committee, Board/Commission Action:

Click or tap here to enter text.

Alternatives:

Click or tap here to enter text.

Recommendation:

Provide Direction to Staff

Coordinated Transit Plan: Progress Report

City Council Work Session
February 05, 2019

Coordinated Transit Plan: Purpose

City and University Continue their Joint Effort to Create a Coordinated Transit Plan which Enhances Efficiency and Accessibility by Forming a Seamless Federally Compliant Transit System for our Community.

Coordinated Transit Plan: Overview

- City/University Coordinated Transit Plan (April 2018)
- Phase I - Identify the Direct Recipient for Coordinated System
  - City Council declared the City as the Direct Recipient (August 2018)
- Phase II - Evaluate Operating Models for Coordinated System

Coordinated Transit Plan: Models Considered

- **Five Models Considered:**
  - Model One – Maintain Separate City & University Systems (Status Quo)
  - Model Two – City Contracts & Texas State University Purchases from this Contract
  - Model Three – University Contracts & the City Purchases from this Contract
  - Model Four – City & University Issue Joint Request For Proposals and Contract Separately while coordinating through an Interlocal Agreements
  - Model Five – Formal Transit Authority to Operate a Combined Transit System

- **Models Two and Four Brought Forward for Further Evaluation**

Coordinated Transit Plan: Model Two

- Achieves the Vision of a Seamless Transit System
- City Issues Request For Proposals
- One Federally Compliant Contract & System with a Single Third Party Provider
- Interlocal Agreements to Coordinate Operations

Coordinated Transit Plan: Model Four

Recommended Model

- Achieves the Vision of a Seamless Transit System
- **City and University Issue Joint Request For Proposals**
- **Two Federally Compliant Contracts & Systems with a Single Third Party Provider**
- **Interlocal Agreements to Coordinate Operations and Funding**

Coordinated Transit Plan: Strategic Outcomes

- Coordinate the City & University Transit Systems
- Provide Transit Services with Seamless Access for All
- Ensure Federal Compliance
- Increase Federal and State Grant Funding
- Recognize Economy of Scale Cost Savings
- Provide Efficient Coordinated Bus Routes

Coordinated Transit Plan: Benefits

- A Federally Compliant Coordinated Transit System
  - Potential Increase in Federal Transit Administration Competitive Funding
    - FTA 5307 Small Transit Intensive City (STIC) Program
    - FTA 5339 Bus & Bus Facilities Infrastructure Investment Program
  - Potential Increase in State Urban Area Formula Funding
- Shared Planning of Transit Operations and Funding
- Minimize Route Duplication and Expand Access
- Provides Opportunity for Regional Transit Services
- Improved Data Collection and Reporting
- Potential for Single Third Party Contractor for both Systems

Coordinated Transit Plan: Challenges

- Federal Compliance Requirements
  - Procurement
  - American with Disabilities Act
  - Civil Rights
- Management & Oversight
- Potential Cost Increases
- Chartered Services

Coordinated Transit Plan: Next Steps

- Finalize and Issue Joint Request For Proposals
  - Evaluate Two Federally Compliant Systems with a Single Third Party Contractor
  - Determine Potential Economy of Scale Savings
  - Assess New Marketing and Communications
- Draft and Approve Interlocal Agreements
  - Coordinated Fixed Routes and Paratransit Services
  - Cost-Sharing
  - Federal & State Grant Funds

Coordinated Transit Plan: Timeline

- August 2018 – City Council declares City as Direct Recipient
- November 2018 – CARTS sends DR concurrence letter to TxDOT
- February 2019 – City sends DR concurrence letter to TxDOT
- **February – April 2019 – Draft and Issue Coordinated Transit Plan RFPs**
- **February – April 2019 – Draft and Approve Coordinated Transit Plan ILAs**
- May 2019 – FTA releases funds for FY 2020
- **October 2019 – City assumes all roles/responsibilities as the DR**

Questions & Answers

CITY OF SAN MARCOS
TEXAS STATE UNIVERSITY

JULY 5, 2018

COORDINATED TRANSIT PLAN STUDY

PHASE I - DIRECT RECIPIENT REPORT

KA ASSOCIATES
OVERLAND PARK, KANSAS

City of San Marcos / Texas State University

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Special Thanks to Project Team Members

- **Rodney Cobb – City of San Marcos**
- **Oscar Hairell – City of San Marcos**
- **Pete Binion – City of San Marcos**
- **Steve Herrera – Texas State University**

Executive Summary

The City of San Marcos and Texas State University jointly hired KA Associates to develop and evaluate options to enhance transit and maximize grant funding opportunities for the community. Phase I of this study presents potential options for direct recipient status of Federal Transit Administration (FTA) funds directed to the San Marcos area and operating models that could be utilized in a coordinated transit system. Phase II, to begin at the conclusion of this phase, will identify implementation measures necessary to put a coordinated system in place.

The recommendations of the Phase I report include:

a. **Direct Recipient Funding** – The Study recommends the City accept the direct recipient role in all federal and state operating and capital transit funding immediately. This action will allow for greater direct involvement and local autonomy of both current and future transit systems.
b. **Continued Operation** – Continue with their respective service providers to allow time to review the specific coordination options.
c. **Proceed with Phase II** – KA Associates along with Study Team members, review and report on a preferred coordinated transit model with recommended funding, operations, and governance.

A variety of factors are used as the basis for these recommendations. These features, more specifically described within the Phase I report, include:

I. **A Summary of Community Stakeholder Involvement –** At a series of stakeholder listening sessions conducted both within the community and on campus, a general vision emerged of what a robust and coordinated transit system in the San Marcos / Texas State community could be - seamless, high frequency, and attractive to choice riders to enhance the overall quality of life in the community and on the campus. Funding, how citizens view public transportation, and access to and from the system are viewed as barriers to this vision.
II. **Review of Consolidation Factors** – The City and University currently commit significant administrative and operational resources to their respective transit systems, many of which are duplicative. However, if planned correctly, a successfully coordinated system – which combines the performance statistics of both the City and University transit systems – could result in reduced duplication and in opportunities for over $1million in new Small Transit Intensive Cities (STIC) federal monies to a coordinated transit operation in San Marcos.
III. **A Detailed Description of Coordinated Operation Models** – KA Associates presented five operating models used in other community / university settings throughout the United States. These operating models, while meeting their community's needs, have varying pros and cons. While the Phase II portion of the study will investigate the appropriate model for San Marcos and Texas State University, in four of these models the City stands as the direct recipient of federal operating and capital formula funding. The details of these models will be useful as the Study continues into Phase II.

A. Introduction

For decades, the City of San Marcos has offered fixed route and paratransit service to the citizens of San Marcos within the community and surrounding regional communities. This service has been operated by the Capital Areas Rural Transportation System (CARTS). Separate from the service offered by the City, Texas State University provides a service primarily designed to meet the needs of students, faculty, and staff. The University service is operated by a third-party transportation contractor, Transdev. In several instances, the service offered by each system duplicates service areas and hours, while leaving other areas and time underserved.

After the 2010 United States census, the City of San Marcos' Federal Transit Administration (FTA) title designation changed from "Rural" (FTA Section 5311) to "Small Urban" (FTA Section 5307) for operating and capital assistance grants. This change meant the City was assigned by the Governor direct authority over these FTA transit formula grants. Since 2013, these grants have been allocated to CARTS. Section 5307, Small Urban transit operating and capital funds provided by the FTA are based on a formula using factors of service area population and area density. Throughout this document, these FTA operating funds may be referred to as "formula grants". The FTA does offer as well, other operating and capital funds that are awarded on a competitive basis.

While both system provide useful service to community and campus constituents, the City and University believe there may be advantages to taking a more coordinated approach to transit and combining certain efforts and resources. The purpose of this student is to review current services provided by both the City and the University clientele and make more effective use of limited resources.

This study will review the performance of current services as well as what potential exists for future consolidated transit service, evaluating them based on:

- Administrative and Operating Costs
- Additional Funding Opportunities Available
- System Performance Metrics

Finally, the study will show a variety of operating model alternatives, and will present:

- An evaluation of each model that includes the pros, cons, and benefits for both the University and City.
- How well each model embodies the Vision for transit as voiced in the University and Community listening sessions (included in Attachment A).
- Recommendations on direct recipient status for federal transit funding.

A.B. Current Operations

1. City of San Marcos

The San Marcos transit system, performing under the marketing brand of "The Bus" is operated by the Capital Area Rural Transportation System (CARTS). Besides the San Marcos fixed route service, CARTS provides rural transportation service to a nine-county area surrounding Austin, Texas. The majority of CARTS' services in the area are rural demand response. CARTS does operate three distinct fixed route services, in Bastrop, Georgetown, and San Marcos. with The Bus being the only fixed route service. CARTS' San Marcos service is funded through an agreement between the City of San Marcos and the transit system, where CARTS is authorized to use the Federal Transit Administration Section 5307 Small Urban operating grant allocated to the San Marcos area. CARTS is governed by a Board of Directors who appoint a local, voluntary advisory committee with five members. The San Marcos Transit Advisory Committee advises the CARTS administration and Board on transit related issues and services within San Marcos. CARTS is assigned the direct recipient status by the City of San Marcos for the FTA Section 5307 funds assigned to the San Marcos urban area.

The San Marcos service has an operating budget of $1,647,918 and a $117,500 capital budget for fiscal year 2018. Revenues for the system include $801,459 in Federal Transit Administration Section 5307 formula grants, $450,000 in funding from the City of San Marcos, $273,299 in State of Texas operating assistance, $45,000 in farebox revenue, and $39,130 in other local revenue. The budget also includes $156,530 in federal and state capital grants.

The Bus operates on seven routes Monday through Friday from 7:00 a.m. to 8:00 p.m. with frequency of service between 30 minutes to one hour. The regular passenger fare is one-dollar with reduced fare for elderly and disabled. CARTS operates a twice per week senior transportation service. Also included in the San Marcos service is ADA complementary paratransit service for those unable to access a bus stop due to a cognitive or physical disability. CARTS administers ADA eligibility certification

Texas State University students, faculty, and staff can ride The Bus for no fare by presenting their University ID. The University is billed back for use by students and employees. During fiscal year 2017, approximately 17% of The Bus' ridership was University students or employees.

CARTS also operates an intercity bus route, Interurban Coach South, that provides four trips, Monday through Friday, to Austin. Interurban fare is $2.00 to $4.00 per trip based on boarding location and final destination.

The Bus fleet consists of twelve fixed route lift-equipped buses with seating capacity ranging from 16 to 27. Additionally, there are three disability vans in the fleet.

Key Performance Statistics – FY 17

- Fixed Route Passenger Trips – 63,511
- Revenue Miles of Service – 260,074
- Revenue Hours of Service – 17,938
- Passengers per Revenue Hour – 3.5

2. Texas State University Bobcat Shuttle

The Bobcat Shuttle is a transportation service administered by Texas State University Transportation Services, a department within the Finance and Support Services Division. Besides the Bobcat Shuttle, the Department also manages alternative transportation programming and parking services for the University. The University operates the Bobcat Shuttle via a purchased bus service contract with Transdev. All operations and maintenance are provided by Transdev under this contract. Generally, the service area for the Bobcat Shuttle includes intra-campus shuttle circulators, routes to remote parking and campus academic and support facilities, and to major off-campus student housing areas.

There are 38 buses in the Bobcat Shuttle system that operate on eleven routes during maximum peak service, carrying approximately 24,000 riders per day, with a one-day ridership peak of more than 33,000 boardings. During the academic year, service hours are Monday through Thursday between 7:00 a.m. and 10:20 p.m.; Friday between 7:00 a.m. and 5:30 p.m., and on Saturday between 11 a.m. and 6:30 p.m. Evening and Saturday service is not available during the summer months and there is no service offered on Sundays, official university holidays, or between semesters when classes are not in session.

The Bobcat Shuttle is open to students, faculty, staff, and the general public. Currently there is no bus pass validation or fare collection required to board. Texas State University is in the process of developing a new fare policy. All buses are ADA compliant and are wheelchair accessible. Funding for the Bobcat Shuttle is generated from a semester-based student fee. The bus fee was last increased to $95 per semester prior to the fall 2014 semester. The bus fee is capped by law to $100 per semester and may only be increased upon student referendum approval. The FY2017 operating revenue for the transit service is $7,020,621 with operating and capital expenses totaling $6,561,722.

Key Performance Statistics – FY 17

- Passenger Trips – 2,786,033
- Revenue Miles of Service – 788,287
- Revenue Hours of Service – 65,820
- Passengers per Revenue Hour – 42.32

E.C. Community Understanding

Modal choices are ever evolving. What were standard mobility alternatives ten years ago – personal car, bus, bicycle, walking – have now progressed to – car sharing, bicycle sharing, trips sharing, even autonomous vehicles – and what were considered essential elements of a robust community and/or campus transportation system have been replaced by these new consumer demands. However, the same essential transportation needs exist.

Within the community, these needs include access to work, play, medical, and shopping that supports a local economy and enhance the community's quality of life. Needs also extend to special transportation services for disabled, elderly, youth, and those without cars.

For universities, transportation is necessary to meet critical campus goals by providing mobility within the campus and service to remote parking to preserve interior open spaces and future building sites. Campus transportation services are essential in providing students access to the community including shopping, entertainment, employment, and other community activities. A vigorous campus transit system and other mobility services such as bike and caring sharing and carpool matching are critical for student recruitment.

To understand the community's and campus' ideas regarding transit in San Marcos, KA Associates conducted stakeholder listening sessions both on the campus of Texas State University and within the City of San Marcos. These four sessions took place June 11th and 12th. A summary and transcribed record of comments and responses are included as Attachment A of this report.

These meetings provided insight into the vision participants had regarding transit and mobility in the San Marcos community, on the Texas State campus, and in the regions surrounding San Marcos. They help to identify the expectations that can assist in fashioning a model for a future coordinated transit system.

While the detailed summary is included as part of Attachment A, these meetings clearly represented the desire for a coordinated transit system. Generally, those who participated imagined a transit service that was a primary transportation choice and well used by the citizens. They envisioned a transit system that supported economic development and tourism.

Also, the envisioned transit service would provide seamless transportation with fares accepted between both a community and University system. Access to regional destinations was important as well as service coverage where riders and population centers exist.

Important too was access for University students to city areas all the time, not just on weekends, and that remote campus parking areas were served with quick, back and forth "bullet" shuttles.

To be successful and meet needs, the participants saw that a future system has to be frequent (ten-minute service during the day and 15-20 minute service at night), efficient (minimize travel times), and reliable. Safety of the passengers is important to the vision including adequate sidewalks for approaching and leaving a bus stop, safety lights and call boxes.

New technologies that report the location and predicted arrival of the bus are important, as well as integrating the buses with other modes of travel. This would include trip sharing (Lyft and Uber), bicycle racks on the buses and other programs that support Transportation Demand Management.

However, there are barriers participants identified that may prevent achieving this vision of transit. Most important was identifying the funding needed to invest in a robust transit service and the political will at the local, state, and federal levels to support the necessary funding. Another was cultural and image issues with transit – that Texans don't ride buses or that riding a bus was not cool, was for poor people, or the service was unreliable.

A physical barrier that may delay achieving the vision is the current infrastructure in the community – street capacity that is too narrow for buses and bicycle lanes, lack of shelters, benches, and lighting at stops, and walkable and ADA compliant sidewalks to bus stops. Another important barrier identified was communication about the services and routes to the community and campus.

While a list of barriers list can be daunting, fortunately there are equally identified institutions and programs in place that support the vision of a coordinated transit system. The current transit operators and their bus drivers have an image of being friendly and inviting to passengers and making the service enjoyable. Employers are motivated to get their employees to work and data is available to support this need. The population and physical growth of the community supports the need for a vital transit system. However, and most important, as we move through the Coordinated Transit Planning process, the participants viewed the common interest both the City and University have in solving the transportation problems in the community as a strong support to the vision.

F.D. Consolidated Transit Considerations

The purpose of this Phase I report is to identify optimum roles between the City of San Marcos and Texas State University in a potential coordinated transit system. As part of this review is the question regarding which entity should take on the role of direct recipient of federal operating funds available to the San Marcos area. The report is to also identify various operating and funding models for the City and University. Phase II of this study will center on the preferred coordinated transit model with recommended funding, operations, and governance.

In order to make a well-informed decision as to which operating system is the best fit for the community and University, several topics pertinent to a consolidated system should be addressed. Below are four major areas that will influence the choices – administration and staffing needs of the models and recipient roles; operation and maintenance of the services; the timing of implementation of a consolidated system, and; funding opportunities that influence the choices.

1. Administration

Operating and policy leadership is essential no matter which coordinated system approach is takenmodel is chosen. Clearly, with two distinct transit operations and management teams, duplication of result in two leadership positions and administrative functions will occur. Should either or both the City or University accept a direct recipient role, there will be a commitment to increased oversight of general administrative functions. within the organizations. Federal recipient roles necessitate additional personnel to deal with the intense data collection necessary to satisfy Federal reporting requirements.

Typically, administration of a transit system the size of San Marcos consists of broad areas of general administration, finance, planning, human resources, communications, customer services, operations, dispatch, and maintenance. With direct operation of the ADA paratransit service, certification of applicants and processing applications will introduce a new administrative is a new activity. Additionally, the ddesignated irect rrecipient of federal operating or capital grants will be required to collect data and submit the annual National Transit Database (NTD) reports that include areas of financial (both operating and capital funding), operations, maintenance, ridership, and safety performance.

Many of these roles are currently handled for the University service through the third-party contractor Transdev – operations and maintenance management, dispatch, customer service, personnel – or through the University administrative functions – administration and policy, planning, customer service, human resources, data collection, and finance. These same roles for The Bus system in San Marcos are being taken care of by CARTS – operations and maintenance administration, personnel, finance, dispatch, communications and customer service, and NTD data collection and reporting. The City of San Marcos

shares management of The Bus through administrative oversight, planning, capital improvements, and communications.

Consolidated approaches to a San Marcos transit system will eliminate many of these duplications. Additionally, support services, including but not limited to human resources, finance, and communications, could be incorporated into the administrative functions of either the City of San Marcos or Texas State University.

3.2. Operation

While the operating features of a consolidated system have not been set – contracted service to a third-party transit operator versus direct operation of the system – there is a long history of both the City of San Marcos and University systems being operated by organizations with a clear transit expertise.

With contracted operations, the City and/or University would set the parameters of service that the contractor would provide. Contract roles would definitely include the hiring and management of bus operators, dispatch and maintenance staff; but, could include as well services such as ADA certification and administration, NTD data collection and reporting, and customer services. Typically, the commissioning entity will retain administrative oversight, planning, finance, grant administration, communications, and any engineering functions within its purview.

4.3. Timing

Implementing a new a new coordinated transit operation ing model is complicated and time consuming. The transition towards a successful start is dependent in large part on planning and programing. Federal contracting, third-party operations start-up, marketing, and service planning can create timing issues that will impact a new, successful transit launch.

Specifically, these timing details include –

- Federal contracting – any new recipient of federal operating or capital funds needs to be aware of the federal conditions and restrictions placed on contracts. The development and execution of federal operating and capital projects may be hindered by the need to insure federal procurement regulations are properly followed.
- Operations implementation – with a contract in place, a new transit operator may need additional time to find sufficient existing space for new transit operations and maintenance facilities or to build a new one.
- Route planning – Concurrent with contract bidding and award, planning staff needs to be busy with the development of a route system that provides maximum coverage to transit-oriented service areas. Federal guidelines will require additional time for needed public notice of route changes and a public review and comment period.

- Marketing and Communication – For a new transit system launch to be successful, media coordination and advertisement of the new services needs to be planned and purchased well in advance of the start date.

5.4. Funding

Expenses
Operating and organizational expenses (personnel and administrative overhead) are dependent on the operating model that is finally chosen and are critical in understanding the costs associated with a new transit organization. As previously mentioned in the Administrative considerations, many administrative indirect costs can be borne by the sponsoring organization. Support services such as personnel, finance, grant administration, and communication could be part of a charge back to either the City of San Marcos or Texas State University.

Currently, the FY 2017-2018 San Marcos operating budget is broken down into the following major categories –

- Personnel – $676,800 (San Marcos Transit Director, Supervisors, Dispatchers, Bus Operators, Station Manager/ADA Coordinator)
- Fringe – $251,660
- Travel – $2,500
- Bus Operations – $268,000
    - Fuel, Vehicle Maintenance, Radios, etc.
- Vehicle Insurance - $55,000
- Facility Operations - $145,000
    - Utilities, Janitorial, Facility Maintenance
- Other Expenses - $248,958
    - Recruitment and Training, Licenses, Uniforms, Office Supplies, Physicals and Drug Screening, Marketing, and CARTS Cost Allocation.

Correspondingly, the Texas State University Bobcat Shuttle has similar operating expenses.

- Administration – $191,700
    - Personnel (Transportation Director, Marketing Coordinator – 50%, Shuttle Manager and Administrative Assistant II – 100%, Alternative Transportation Coordinator – 70%)
    - Fringe
- Bus Operation and Maintenance to Transdev – $5,655,609
    - Operators, Vehicle Maintenance, etc.
- Fuel - $406,493
- Services - $289,127
    - DoubleMap, Studies, University Overhead
- Cart Subsidy - $10,632
- Facility Operations - $3,476

- Other Expenses - $4,685

There are, however, direct costs that need to be addressed as part of a budgeting process. In reviewing the current fiscal year CARTS budget for the San Marcos services, the breakdown of budget categories and expense includes:

2. Direct Personnel (salary plus 37% fringe benefits):
    - Transit Director - $97,270
    - ADA Coordinator - $49,320
    - Other new local personnel currently not in CARTS San Marcos budget
        - Communications / Marketing Assistant - $76,473[1]
        - Administrative Coordinator (data collection) - $45,703[2]
        - Administrative Assistant (office support) - $43,367[3]
1. Facilities / Administrative Offices - $80,000[4]
2. Administrative Overhead and Support (human resources, finance, legal) - $150,000[5]

(It is important to understand that which ever organization takes the lead in this coordinated transit effort, by becoming the direct recipient of the FTA operating and capital grants, there is a significant commitment to performance, financial, operating and maintenance data collection that will add at a minimum one new staff member and based on the division of work, may need additional support throughout the year.)

From this information, there are areas where current duplication of expenses could be eliminated under a coordinated transit operation. In four of the five models discussed in the next section, administration, marketing, and operations and maintenance are all potential areas of cost savings

While these costs for personnel are approximate based on current budget or regional occupation average, they represent personnel, administrative support charge-back, facility, and overhead that would be comparable to a stand-alone transit operation. All other general costs – driver and supervisory salaries, fuel, maintenance, operations, administration, and insurance would be part of an overall third-party operations contract. In this case of operating expense, it would correct to assume that current contract expenses would be comparable to a new transit operation..

Revenue

Besides the expenses associated with a consolidated transit system in San Marcos, a consolidated transit service could generate significant and substantial new funding revenues. Currently, operating revenue for both The Bus and Bobcat Shuttle operations consist of the following –

- The Bus (San Marcos) for FY 2018

[1] *Zip-Recruiter* Communications Assistant projected salary average for San Marcos, Texas
[2] *Zip-Recruiter* Administrative Coordinator projected salary average for San Marcos, Texas
[3] *Zip-Recruiter* Administrative Assistant projected salary average for San Marcos, Texas
[4] CARTS identifies as "Facility Maintenance"
[5] CARTS identifies as "Cost Allocation"

- Federal Operating Grants (Section 5307 Small Cities and Growing States) - $801,459
- City of San Marcos - $450,000
- State TXDOT Formula Grant - $273,299
- Farebox - $45,000
- Other Local - $39,130
- **Total Operating Revenue** - $1,608,888

– Bobcat Shuttle (Texas State University) for FY 2017
- Student Fees - $7,010,621
- Parking Subsidy - $10,000
- **Total Operating Revenue** - $7,020,621

These are significant funds that provide a quality service to the community and University; however, additional funding could be achieved through a consolidated transit effort. Under current federal legislative and administrative policy, there are opportunities for new formula grants through the Small Transit Intensive Cities (STIC) program. These grants are based on performance indices of the transit system and regional population statistics. For Federal Fiscal Year (FFY) FY 2017, the University collected and submitted to the Federal Transit Administration all performance data necessary to be considered in the six STIC categories. CARTS was not required to provide passenger mile data so the FFY 2017 National Transit Database (NTD). Statistics for The Bus are only available for three of the six formula categories.

Based on FFY 2017 data, the combined performance of the two systems exceeds the average criteria in five of the six categories. This would qualify the San Marcos region for an additional $1,010,000 in operating assistance in STIC monies based on current federal funding allocations, double the current federal operating assistance. For FFY 2018, each category milestone achieved garners $202,000 in grant funds. Please note that passenger miles not reported by CARTS may impact overall statistic calculation under a coordinated system. Formula performance statistics include:

- Service Area Population – 54,076[1]
- San Marcos (The Bus)[2] –
  - Revenue Miles – 260,074
  - Revenue Hours – 17,938
  - Passenger Trips – 63,511
  - Passengers Miles – not required to report

- University Operation (Bobcat Shuttle)[3] –
  - Revenue Miles – 788,287
  - Revenue Hours – 65,820
  - Passenger Trips – 2,786,033
  - Passenger Miles – 6,675,434

- STIC Categories and Performance

Small Transit Intensive Cities (STIC) Category	**STIC Performance Threshold**	**San Marcos Regional Performance**
Passenger Miles Per Vehicle Revenue Mile*	6.34	**6.37**
Passenger Miles Per Vehicle Revenue Hour*	111.53	79.70
Vehicle Revenue Miles Per Capita	11.48	**19.39**
Vehicle Revenue Hour Per Capita	0.73	**1.55**
Passenger Miles Per Capita*	82.31	**123.44**
Passenger Trips Per Capita	12.57	**52.70**

*"PPassenger Miles reflect Texas State University statistics only. CARTS is not required to collect Passenger Miles data.

[1] From CARTS' FY 2016 NTD Report
[2] FY 2017 NTD statistics provided by CARTS
[3] FY 2017 NTD statistics provided by Texas State University

G.E. Transit Operating Model Options

Model 0: University and City Jointly Maintain Their Separate Transit Systems with Federal Operating Assistance Supporting the City System Only

City of San Marcos:

Within this scenario, the City of San Marcos would manage The Bus community system with both fixed route and paratransit service, either directly as a City operated transit system or through a third-party contractor. Planning support for route service areas, marketing of the system, administration of ADA certification, and determinations of frequency of service and hours of operation would be determined by the City staff. With the City of San Marcos as the direct recipient of federal transit funds, the City would have authority regarding the use of federal monies to support the operation of the system and capital funds for the use by the City to purchase new transit vehicles, construct passenger amenities, and invest in operational and maintenance facilities to support the operation.

Texas State University:

The University would continue to operate its Bobcat Shuttle service to provide the necessary transit service for the University students and employees – mostly to provide intra-campus transit and service from remote parking areas to the campus core. The University would have options regarding service out to major off-campus student housing areas. The University could:

- Stop offering service to off-campus apartment at which time these complexes would have to rely on The Bus to provide transit service to the campus;
- Provide secondary, and many times duplicative, transit to the apartments as funding and service priorities allow, or;
- Ask that these complexes subsidize the University's service to their development or that the apartments operate their own shuttles to and from a designated campus transit hub (the University of Oklahoma gains approximately $240,000 in operating revenue through subsidies from apartment complexes).

Features of This Model:

As this model mirrors in many ways the current operation of the two systems, there is no urgency or pressure to coordinate the services to reduce or eliminate duplication of service, provide joint access between the systems, or share facilities. Mobility within San Marcos and the University goes down divergent paths with both constituencies underserved for a seamless access to the campus and community. This model could include agreements for a universal pass (student/employee ID) for University students and staff to access the City system but typically does not allow community access to the University service, although the University service at this time does not turn any passenger away.

Table 1: Model 0 Evaluation		
	City	**University**
Pros	• Involves minimal change of the City operating model • Provides the option for the City to directly operate the system or contract to a third-party • City has complete control and management over the system administration • Federal funding would be directed at a community system • City would be the direct recipient of the federal operating funds • Decision making for service and operational issues stays within the City control	• University controls the extent of on- and off-campus service provided • University can focus their dedicated transit funds to the needs of the University • Operationally limited to shuttle services and as needed to high density off-campus student housing locations • Minimal compliance to federal and state operational guidelines • University can contract with the City service for students and employees for no fare with ID.
Mutual Benefits	• City and University are both familiar (comfortable?) with this model	
Cons	• By keeping the City and University separate, the potential for additional federal funding will be difficult to achieve • City must identify and contract with a third-party operator or create a new administrative/operating department within the City to directly operate the system • City staff will take on additional administrative and policy responsibility with direct transit operation • City takes on the responsibility to report federal performance data and comply with federal administrative and procurement regulations resulting in increased personnel and administrative costs • Increased management and oversight • New service areas and/or frequency must be locally funded	• No access to shared federal operating and capital funds • Capital costs borne by University • Limits expansion without additional University funding
Mutual Barriers	• Little incentive for collaboration • Duplicative transit services between the City and University continue unless negotiated • Unless specifically negotiated, limits access to services between constituencies	

Table 1: Model 0 Evaluation (cont.)	
	• Fosters the status quo of uncertainty between the City and University transit systems
Notes	• **Supports the Vision by:** o None identified • **Does not support the Vision by:** o Maintains separation of service and limits cross access o Frequencies, hours and locations of service not coordinated to need o Passenger amenities (shelters, benches) not coordinated o Piecemeal planning and implementation of Transportation Demand Management activities o No coordination on service outside the region o Fosters the "Texans don't ride buses" mentality and image of buses o Disregards interest in promoting a coordinated system • **Other Comments** o Typically occurs in larger metropolitan areas where: ▪ the City or a transit authority operated system runs without consideration for the needs of the University and; ▪ the University supplements transit for intra-campus service circulators and shuttles to remote parking and university residence halls. • **Examples of this model in City/University relationships include:** o The University of Rochester / Rochester Regional Transportation Service o The Ohio State University / COTA o Oregon State University / City of Corvallis

Model 1A: City Is the Sole Operator of Community-Wide Transit Service with the University Purchasing Campus Shuttle Services as Needed

City of San Marcos:

In this model, the City serves as the primary provider of transit service within San Marcos and has overall management responsibility for all phases of the transit service either as a City administrative department or through an operational contract with a third-party provider. The administration, planning of routes, hours of operation, and service area are under the City's purview. The system would operate not only fixed route service but also be responsible for the ADA paratransit service and administration. The University would purchase transportation from the City. The City would be the direct recipient of the region's federal operating funds. As the broker of transit service within the community, the system would benefit from being able to count ridership and other performance criteria generated from the University. This would make the system eligible for enhanced STIC federal funding. Conversely, the City takes on compliance responsibilities for federal procurement, administrative, and reporting requirements.

Texas State University:

As the consumer of transit service instead of the provider, the University would "purchase" transit service for its needs, including the intra-campus circulators, shuttle services to remote parking and necessary route service to high-density housing. As a major funder of the community transit system operated under the City control, the University would have influence in planning services that would primarily serve the high-density student housing areas. Typically, universities that work under this scenario include universal pass access for students and staff using their campus ID. This would require earnest discussion on University representation on the governing board.

Features of This Model:

Under this model, the University will be the major consumer of transit within the region provided by the City. As such, they are the major funder of the service. This model requires that the transit needs of the University are a major part of the service and the University directs their funding to meet the needs of students and employees. It eliminates City and University routes duplicating service areas. Concerns over service to high-density housing off campus – routes, frequency, and hours/days of service – would be negotiated between the City, University, and the residential developer / owner.

Table 2: Model 1A Evaluation

	City	University
Pros	• City has complete management over the system administration • Federal funding would be directed at one community system • Decision making for service and operational issues is within the City control • City recipient of additional University ridership statistics for grant funding enhancement	• University can continue to focus their dedicated funds to campus mobility needs • Potentially could minimize operational and administrative overhead – out of the bus operations business • Maintains mobility access for students and staff • Shift costly collection and processing of performance statistics needed for additional federal funding to the City
Mutual Benefits	• Opportunities for additional federal funding exist • More incentive for collaboration • Relationship and trust building between the City and University • Potential to eliminate duplication of routes to the same service areas	
Cons	• May cause conflicts for allocation of limited resources between needs of University in competition with community • May result in the City having to increase funding to meet the share commitment for new federal funds •	• Reduction in control over transit service decisions • Special event / special student need transit services are potentially limited • Ability to respond immediately to an unforeseen transit demand greatly reduced •

Table 2: Model 1A Evaluation (cont.)		
Cons	• Community expectations for service may exceed what the City can afford to provide • Increased management and oversight • Additional costs associated with federal issues / compliance	• Decision making for non-campus service needs outside the University control • Reduced influence in service decisions Does not insure that non-campus service benefits the University • Representation on decision making board negotiated
Mutual Barriers	• Concern the City operator will serve the University's constituents as well as the current system does	
Notes	• **Supports the Vision by:** ○ Creates seamless transit system within the community ○ University students and staff have access to City system ○ Viewed as a "community" system ○ Increased potential for new service areas, frequency, and hours of operation ○ Coordinated passenger amenities and infrastructure improvements ○ Promotes coordinated planning of route services ○ System becomes the sole "mobility" authority within the area and can plan for other "TDM" services • **Does not support the Vision by:** ○ While has the potential to generate additional federal operating assistance, it does not guarantee the overall increases in service • **Other Comments** ○ Very common approach to transit relationship between a community and university • **Examples of this model in City/University relationships include:** ○ Texas Tech University / Citibus ○ University of Wisconsin / Metro Transit ○ Colorado State University / Transfort ○ West Virginia University / Mountain Line Transit	

Model 1B: University Is the Sole Operator of a Community-Wide Transit Service with the City Purchasing Community Service as Needed

City of San Marcos:

Completely the opposite of Model 1A, in this approach the City is the purchaser of transit service that is administered by the University. The City assigns its control of federal operating funds and any local matching share to the University. Collaborative opportunities are at the administration of the University. The City relies on coordination between the University and City to ensure that transit needs are provided to the citizens. Would require earnest discussion concerning City representation on the governing board.

Texas State University:

In this model, the University would be the direct recipient of the federal operating funds and thereby takes on compliance responsibilities for federal procurement and administrative requirements, provision of ADA paratransit administration and service, and new administrative responsibilities of planning routes in the community with associated decisions regarding service area, frequency, and days and hours of service. With the federal funds, the University services become open to the public and necessitate collecting fares and selling passes. With combined ridership statistics, the system would have the ability to access enhanced federal operating funds.

Features of This Model:

This model relies on the University being the provider and administrator of the transit service to the community. This model works best in instances where – 1) the city administration has no interest in transit within the community and abdicates their interest to the university, or; 2) where there exists a shared goodwill and trust between the city and university administrations so the city is comfortable with the university providing a level of transit service that meets the need of the citizens of the community.

Table 3: Model 1B Evaluation

	City	University
Pros	• Potentially could minimize operational and administrative overhead – out of the bus operations business • Maintains mobility access for community • Shift costly collection and processing of performance statistics needed for additional federal funding to the University	• University has complete control over the transit administration and management • University transit has access to additional federal and local funds for operation and capital purchases • Decision making for service and operation are within the University control • Students, faculty, and staff have universal access to the system • Insures the priority for University mobility needs • Retains the ability to respond to new transit demand
Mutual Benefits	• Minimizes duplication of services • Increases the need for cooperation and collaboration • Relationship and trust building between the City and University • Provides potential for more federal operating and capital funds	
Cons	• Decision making for service and operational issues is outside the City direct control • Loss of influence in service decisions • Does not insure that community transit needs are being fully met	• With acceptance of federal money, special event / special student need transit services may be restricted • Could be viewed by the San Marcos public as a "University" system even though open to the public

Table 3: Model 1B Evaluation (cont.)		
Cons	• Removes influence from community mobility planning and operation • System becomes seen as a "University" transit system • Community expectations for service are lowered • Representation on decision making board negotiated Services to youth, elderly and disabled may get lost in the shuffle of a University operated system	• University staff will take on additional administrative and policy responsibility with direct transit operation • Additional services outside the core of University business • May cause conflicts for allocation of limited resources between needs of University and community • Adds responsibility to be pro-active to public and disability transit need • Additional costs associated with federal issues / compliance • University would need to purchase fare collection equipment and develop security procedures and staffing
Mutual Barriers	• Concern the University operator will serve the City's constituents as well as the current system does	
Notes	• **Supports the Vision by:** ○ Creates seamless transit operation within the community ○ University students and staff have access to University system ○ Increased potential for new service areas, frequency, and hours of operation ○ Coordinated passenger amenities and infrastructure improvements ○ Promotes coordinated planning of route services ○ System becomes the sole "mobility" authority within the area and can plan for other "TDM" services • **Does not support the Vision by:** ○ May be viewed as a "University" system ○ University focus may not serve interest of the community • **Other Notes** ○ Very uncommon approach to transit relationship between a community and university ○ Transit is not typically a core business or service of a university • **Examples of University operated public transit systems include:** ○ Oklahoma State University / City of Stillwater ○ University of Arkansas / City of Fayetteville ○ University of Oklahoma / City of Norman	

Model 2: University and City Maintain Separate Services But Share Federal Operating and Capital Funding Either as Prime Direct Recipient or in a Direct Recipient / Sub-Recipient Relationship Role

General Service:

In this model, the City of San Marcos would continue to administer The Bus while Texas State University would maintain operating control over the current campus bus service. Through a controlling agreement, both the City and University would agree through a Memorandum of Understanding to -

- Maintain separate operating systems and service characteristics and needs.
- Provide common access between both systems for all passengers – City passes and fare accepted on University routes and University students and employees fare free on City routes.
- The City and University combine route performance statistics to achieve greater federal funding opportunities through the STIC funds and share these gains to the mobility benefit of both parties.
- Share operations and maintenance contractors, marketing, and passenger amenities.
- Service planning, funding, and operational decisions addressed in the MOU and made jointly.

Federal operating assistance could either be shared between the City and University as co-direct recipients for both current and new, or the City, as the primary direct recipient, could focus federal funds on routes that jointly benefit the needs of both the community and campus. In this case, the University could maintain their independence from federal funding and thereby provide the University with greater flexibility for bus service to special events and programs.

City of San Marcos:

The City would maintain their existing authority over The Bus system that serves the community. Paratransit services and administration would continue with the City operation. The level of transit service would be proportionate to the funding commitment the City makes to the service.

Texas State University:

Through this coordinated system, the University would continue to operate the current transit service to meet the needs of their constituents and the University would maintain its authority and control over the current services. However, as either a co-direct recipient or sub-recipient of federal operating and capital funding, the system would need to be open to the public and comply with FTA rules and regulations.

Features of This Model:

The shared manner of this model requires a high level of coordination between both parties. It has the potential to move towards the robust and synchronized community and campus

service included in the stakeholder vision. To make this model work to its greatest potential, both parties must go into planning and implementation with a united approach on the possibility it presents and the benefits that can be achieved. A collaborative effort between both parties would create a coordinated route structure and shared opportunities for marketing, passenger amenities, operations, and maintenance. With the combined performance statistics between the City and University systems, additional incentive operating grants would be available to provide supplemental operating revenues.

Table 4: Model 2 Evaluation

	City	University
Pros	• Maintains control over the management and services to the citizens • Joint operating and maintenance with the University may create additional savings through economies of scale • Maintains a Community transit identity that is welcoming to local citizens • Promotes heightened coordination with the University • City has control over services to elderly and disabled constituencies	• Maintains control over the management and services to the University • Joint operating and maintenance with the City may create additional savings through economies of scale • Promotes heightened coordination with the City • Maintains a University transit identity • Maintains special event / special student service responsiveness
Mutual Benefits	• Provides opportunities for shared services and facilities • Provides potential for new federal operating and capital funds • New savings opportunities are created by elimination of duplicative services	
Cons	• Does not create a consolidated system with one identity	• University will need to accommodate fare collection and security • Imposes new federal and state administrative and operational requirements • Does not create a consolidated system with one identity
Mutual Barriers	• Requires concentrated and honest negotiation regarding shared responsibilities and governance • Has the potential for creating a sense of independence with overall vision focused on the individuals that participate in the decision-making process	
Notes	• **Supports the Vision by:** ○ Moving towards a seamless transit system within the community ○ University students and staff have access to City system and citizens to University system ○ Increased potential for new service areas, frequency, and hours of operation ○ Promotes coordinated planning of route services and passenger amenities and infrastructure improvements	

Table 4: Model 2 Evaluation (cont.)	
Notes	• **Does not support the Vision by:** o Beyond the mutually agreed upon shared operations and funding, direction of planning and vision for the transit system is narrow • **Other Comments** o Requires mutual trust and cooperation between the City and University o Promotes coordinated marketing and shared route service responsibility o Provides a "success story" from which other collaborative programming can occur • **Examples of this model in City/University relationships include:** o University of Kansas / City of Lawrence

Model 3: Mutually Created Public Transit Authority as Direct Prime Recipient of Federal Funding and Transit Operation

General Service:

In this model, the City and University would jointly agree to the creation of a public transit authority or district to operate a unified transit system for the City of San Marcos and the University. The funding of this system would be through shared sources of both entities and would maximize the fullest extent of federal monies available through the unified system. All planning, operation, marketing, maintenance and administration would be conducted by the Authority staff. Fixed route and ADA paratransit service would be either directly operated by the Authority staff or contracted to a third-party transit operator. The Authority could serve as a bridge that supports service interests of both the City and University. Representation on the governing Board that maintains policy and fiscal responsibility would be negotiated. Service goals for both the City and University would be commonly addressed and the Authority Board and staff would have the potential to address other mobility concerns and needs of the City, University, and region.

City of San Marcos:

The City would yield their interests in the community transit system to their representatives on the Authority Board and the University Board membership and Authority staff. All transit functions and would be determined by the staff and Board membership.

Texas State University:

The University would yield their interests in the community transit system to their representatives on the Authority Board and the City Board membership and Authority staff. All transit functions and would be determined by the staff and Board membership.

Features of This Model:

The creation of a transit authority provides the opportunity to combine the interests of both the City and University through a shared proportional governance. The staff would maintain focus on the planning of transit services with a common transportation interest.

Table 5: Model 3 Evaluation		
	City	**University**
Pros	• Enters into a shared governance that focuses on common transportation interests of both the City and University • Seen as a seamless transit system to the community • Optimizes operation with one operator for both City and University needs • Requires heightened coordination with the Authority • Federal and state reporting will be the responsibility of the Authority	• Enters into a shared governance that focuses on common transportation interests of both the City and University • Seen as a seamless transit system to the University • Optimizes operation with one operator for both City and University needs • Requires heightened coordination with the Authority • Federal and state reporting will be the responsibility of the Authority
Mutual Benefits	• Creates community transit operating system • Provides opportunities for shared services and facilities • Bridges the opportunities for City and University collaboration • Maximizes potential for additional federal operating and capital funds • New savings opportunities are created through one transit operation • Virtually eliminates duplication of current transit services • Can be nimble to the needs of either the City or University	
Cons	• Sole control of transit future placed in a representative board • Service needs of the City weighed independently with the overall needs of the community • Startup funding may be needed prior to operation	• Sole control of transit future placed in a representative board • Service needs of the University weighed independently with the overall needs of the community • Startup funding may be needed prior to operation
Mutual Barriers	• Governance representation is based on financial stake in operation • Has the potential for creating a policy independence outside the direction or desires of either the City or University	
Notes	• **Supports the Vision by:** ○ Creates seamless transit system within the community ○ University students and staff have access to City system ○ Increased potential for increases in service areas, frequency, and hours of operation ○ Common direction under single leadership ○ Coordinated passenger amenities and infrastructure improvements ○ Promotes coordinated planning of route services ○ Has the potential to plan regionally as well as locally ○ Becomes the mobility Authority with program coordination beyond transit to other modes ○ Consolidates funding and makes it more efficient ○ Consolidated marketing and communication	

Table 5: Model 3 Evaluation (cont.)	
Notes	• **Does not support the Vision by:** o Beyond the mutually agreed to shared operations and funding, direction of planning and vision for the transit system is independent of the City and University • **Other Comments:** o Has both of the same pros and cons for each entity o Requires mutual trust and cooperation between the City and University • **Operational examples include:** o Iowa State University / City of Ames

H.F. Summary and Recommendations

From the study, KA Associates found that The Bus, the San Marcos transit system operated by CARTS, and the Bobcat Shuttle, operated by Texas State University, provide an important service to their passengers. However, while the service may be providing value to current users, opportunities definitely exist that could provide even greater transit performance and benefit for the City and University.

The listening sessions conducted by KA Associates provided the vision of what a robust transit system in the San Marcos / Texas State community could be, including the system being "cool", a higher frequency of bus service, extended hours of operation, all resulting in a transit operation that competes for "choice" riders in San Marcos and adds to a variety of other mobility options.

The participants clearly identified funding as a serious barrier to achieving their vision. Based on other coordination efforts of the past between the City and University, the "political will" necessary to consolidate the two systems was also seen as a major obstacle. But with difficulties come opportunities. The fact that the City and University are jointly studying this question of coordination again is an opportunity to create a new chapter in the City / University relationship.

In order to enter into a coordinated relationship, it is essential to understand the operating and administrative issues associated with shared services. Presented within the study is a breakdown of the costs and responsibilities direct transit operation and receipt of federal transit funds will have on both City and University service and funding. There will be additional costs by accepting the direct recipient role. However, a coordinated transit system has the opportunity to provide significant savings by elimination of duplicative costs and services and, through combined performance data of both the City and University, a potential to double the federal operating funds to the area through the STIC program. STIC fund access is based on previous year performance. In order to access for the region these new STIC funds as quickly possible, it is recommended that the City and University work jointly on consolidated performance metrics that satisfy the timing of these funds.

From this analysis, KA Associates identified a variety of operating models that support the vision. The models include a "no action" model that maintains the current operating service and structure up to one that calls for a combined "transit authority" created for the mutual benefit of both the City and University. These models can serve as the basis for discussion regarding a final coordinated transit operation that will be part of Phase II of the study.

In four of the five operating models, the City would serve as the direct recipient of the FTA's Section 5307 Small Urban transit funds. By accepting this direct recipient designation, the City would create more governing control over the operation of the system and potentially protect the system from potential consolidation into larger transit systems as the result of

the 2020 census. The report supports the City as the direct recipient of these funds moving forward immediately.

The operating agreement with CARTS expires on September 1st. Concurrent with accepting the role as direct recipient, the City should as well continue the operating relationship with the current provider. It is during the time of the extended service agreement that the second phase of this study can be completed with a final report addressing the best approach to a coordinated transit system in San Marcos and the operating, governance, and funding options that will work best for the community and University.

Attachment A

Summary of Stakeholder Input Meetings
Texas State University, June 11, 2018
and City of San Marcos, Texas, June 12, 2018

KA Associates facilitated four meetings on June 11 and 12, 2018 to discuss a vision for transportation in San Marcos, Texas. Groups discussing the vision included students, faculty and staff at Texas State University, and City Council members, City staff and community stakeholders for the City of San Marcos. A detailed listing of all the comments and a list of the meeting participants for each meeting is attached. Following is a summary of the discussions.

Overall Vision for Transportation at Texas State University and San Marcos, Texas

Vision, Qualities of Service:

- "C.A.R.E:"
    - Convenient
    - Accessible
    - Reliable
    - Easy
- Image is cool
- First choice or main choice for getting around San Marcos; attracts choice riders
- Well used by entire community. Serves Texas State student, faculty and staff and San Marcos community members including youth for after school activities, ADA, and elderly passengers
- Supports tourism and economic development efforts, including employment and special events
- Plenty of room for all passengers, seating capacity meets demand
- Vehicles are accessible for all

Vision, Service Areas:

- One service for City and University; City and campus residents can ride each other's buses. There could be separate service for specific destinations, but passes / fares work across systems and the systems are integrated
- There is connectivity within city and to other regional cities (like Megabus)
- Bus covers all areas where there are riders and population centers. Geographic coverage is provided (by some mode) for all stakeholders
- As new locations are developed, service is adapted to cover (e.g. Star Park)
- Students can get to city areas, there is seamless transition. Target/Walmart (shopping) available by bus regularly, not just weekends
- Remote parking served by quick bullet shuttles

Vision, Service Frequency and Timing:

- Service is frequent, efficient and reliable
- There is coordination between travel modes and bus schedules
- There is service during breaks
- Service like a taxi or an Uber to drop off early and late closer to home
- Ten-minute service during the day and 15-20-minute frequency at night

- Routes are efficient with minimal travel times
- Service hours match the libraries and exam schedules

Vision, Amenities and Technology:

- There are benches, shelters, safety lights callboxes at stops
- Next bus arrival information at stops, real time bus information is available to passengers
- Real time parking location is available
- There are bike racks on buses
- There is good traffic infrastructure (e.g. ADA pickups not blocking traffic)
- First Mile - Last Mile coverage
- There are mobility hubs with walkable / bike-able infrastructure at bus stops and Transportation Demand Management
- University ID covers fare collection on The Bus

Barriers to Achieving the Vision:

- Money/Funding
- Culture and Image: "Texans don't ride buses" (or bicycle, or walk); stigma that transit is "only for poor people who can't afford a car"
- Lack of political will at local, state and federal level
- Lack of coordination between City and University systems; town/gown conflicts
- Service doesn't cover all geographic areas
- New developments on outskirts of San Marcos desire transit but they are not offering to fund it
- Service seen as unreliable as passengers are skipped at heavy ridership times due to buses being full
- Lack of existing infrastructure (and the cost to upgrade) including:
    - street systems that don't support increased transit vehicle frequency along with regular vehicular traffic and bike lanes,
    - lack of shelters and benches, call phones, safety lighting
    - lack of walkable, ADA infrastructure at bus stops and beyond
- University service changes during breaks and can't be relied on by year-round riders
- Communication about existing service is not getting information to passengers (e.g. mis-information heard at meetings regarding bus locator app, ability to ride Sam Marcos' The Bus by Texas State community, bike racks on buses, etc.)

Supports to Achieving the Vision

- University and City have common interest in solving transportation problems for the whole community
- Bus drivers are excellent, helpful and make the service enjoyable
- App gives real time information about bus location
- Studies available that show foot traffic patterns, travel patterns and retail frequency
- Employers are motivated to get employees to work reliably
- Population growth supports more service; planning occurring as growth continues; there are areas of population density; future modeling of city growth is dependent on transit alternatives
- Rebranding is good, buses look cool

- Community is progressive and would support transit if efficient. There's creativity and research knowledge in San Marcos and at Texas State University
- Using bus saves money (parking and gas money not needed), and can study on the bus

Meeting Notes

Stakeholder Input Meetings
Texas State University
Student Group
Noon, June 11, 2018
Comal Hall Conference Room

Vision

1. Bus covers all areas of riders, population centers
2. Make it to class on time
3. Plenty of space for everyone
4. Nighttime service every 15-20 minutes
5. Service ours match the library schedule
6. Exam hours, need to get to campus early/ service schedule takes into account
7. Smaller vehicles with faster pickups (passenger loading)
8. Service like a taxi or an Uber to drop off early and late closer to home
9. Call box by late night bus stops for safety
10. Accessibility vehicles regardless of weather
11. Students can get to city areas, seamless transition
12. Push notifications for bus arrivals
13. App with bus location to schedule arrivals and departures
14. Push notifications
15. Flexible bus configuration for peak riders (seats that fold up for more standing space)
16. Next bus arrival information at stops
17. No fare for city transit
18. Target/Walmart (shopping) availability by bus regularly not just weekends
19. Service during breaks
20. Service to Posie Road facility

Barriers

1. Ridership is heavy and passengers skipped 8:45/9:00 AM
2. Funding
3. More staff
4. Inflexibility of contract for more (or adjustments to) service
5. Weather / flooding

Supports/ Things Liked About Current Service

1. Enough service to get me to classes
2. Save money, don't need parking or gas money
3. Saves time, can study on the bus
4. Convenient campus loop

Texas State Students (con't)

5. Drivers are so nice, they go out of their way to make your day good, they are interactive and friendly
6. Advertising on the bus is there to help me (primarily campus related)
7. App and navigation showing where the bus is located is very helpful
8. Can still use shuttle even if an off semester/not enrolled
9. Benches and shaded areas at stops

Participants

Claudia Carmona
Allyson Schlandt
Claudia Gasponi
Pablo Oliveras
Alisha Casteneda
Abiel Sifuentes Jr.
Vanessa Batz
Jobelle Mariano

Observed by

Steve Herrera, Texas State University
Stephanie Daniels, Texas State University
Margarita Pitti, Texas State University
Pete Binion, City of San Marcos

Meeting Conducted by

Hugh Kierig, KA Associates
Judith Kierig, KA Associates

Stakeholder Input Meetings
Texas State University
Staff and Faculty Group
1:00PM, June 11, 2018
Comal Hall Conference Room

Vision

1. Geographic coverage provided (by some mode) for all stakeholders
2. Various campus locations (e.g. new campus reading room, e.g. Star Park/University Archives) – service adjusted as new locations needed
3. Encourage walkable areas (protection from heat, provide shade) and bikeable areas connecting with bus stops
4. Computer matching of riders and cars (like Uber)
5. Strong connections between various campus modes (e.g. start of trip to end of trip/like in NY where you walk to subway, end of route.) Connections are walkable, bus-able between campus and remote parking, campus and downtown.
6. There are benches, shelters, safety lights at stops
7. Frequency is approximately 10 minutes. There may be difference between wait times for city and campus
8. Ideally one service for City and University
9. City and campus residents can ride each other's buses. There can be separate service for each the city and campus especially for specific destinations
10. Coordination between travel modes and bus schedules
11. Last mile amenities e.g. bike share areas, sidewalks, lighting
12. Good infrastructure (e.g. ADA pickups not blocking traffic)
13. Bike racks on the bus
14. Knowledge of where parking is available in real time, where it's located, socialization to be flexible
15. Fares and passes work across systems
16. Energy efficient, non-polluting electric vehicles and solar power generation at parking structures
17. Reliable schedule through breaks and year round

Supports to Achieving Vision

1. Creativity and knowledge in departments on campus
2. Bus pass, fare on interurban
3. Bus drivers – excellent transit staff
4. Sustainability curriculum could promote research, beta testing, grants
5. Reliable – easy to know schedules, riders can just show up
6. Real time bus information is available
7. Outreach to new students at orientations, Paws Preview
8. Bus stops are visible

Texas State Staff & Faculty (con't)

Barriers to Achieving Vision

1. Money for infrastructure, technology, service levels
2. Culture "Texans don't ride buses, walk or bike"
3. City and University don't talk – service is not coordinated, need to think of whole population, now double service in some areas and no service in others
4. No shelters, lighting, sidewalks – they are either lacking or need improvement
5. Political will (lack of) including state, federal and local
6. Constant turnover of student population
7. Road conditions / construction / coordination

General Comments About Service from Faculty/Staff Group:

1. Need more information given out about how to access the app with the bus locator
2. City transit should cater more to student population, low frequency
3. Transit provider is willing to cooperate and is helpful
4. Identify best practices and copy them
5. Tailor services to current population levels

Participants

Peter Siegenthaler, Faculty
Rebecca Bell-Metereau, Faculty
Stephanie Daniels, Staff
Margarita Pitti, Staff

Observed by

Steve Herrera, Texas State University
Pete Binion, City of San Marcos

Meeting Conducted by

Hugh Kierig, KA Associates
Judith Kierig, KA Associates

Stakeholder Input Meetings
City Council "Lunch and Learn"
Noon, June 12, 2018
City Hall, City of San Marcos

Vision for Transit in San Marcos

1. Well used by community
2. Extended hours -- cover work, shopping, medical, school, e.g. 7am – Midnight M-F, Until 11pm Saturday and Sunday
3. Image is seen as transportation for all people. Choice riders. Image is cool
4. Youth are active users of the system
5. Service going into neighborhoods
6. Accessible for after school programs
7. Convenient – Accessible – Reliable - Easy **"C.A.R.E"**
8. Connectivity -- travel to major cities
9. People can choose not to own a car
10. "First Mile / Last Mile" covered
11. Mutual benefit and respect for all partners' Vision
12. Senior mobility without car dependence
13. Texas State students are served for employment
14. Bullet runs from commuter parking areas to campus
15. Buses run on time
16. Student parking behavior is improved because transportation is so reliable
17. Seating capacity of buses meets demand
18. There are special event shuttles e.g. Sights and Sounds of Christmas
19. Tourism and economic development friendly. Supported by transit. Enhances tourism, e.g. convention spouses
20. Mill Street / housing density / remote parking areas served
21. Downtown employees served by transit
22. Frequency is sufficient for demand / desires
23. There is route efficiency, minimal travel times
24. Transit Demand Management
25. Integrated system (transfers)
26. Mobility hubs with connections - electric cabs, bike share
27. Pleasant amenities
28. Highest technology
29. Megabus hub
30. Best provider
31. Communication between entities about service
32. Becomes a primary choice for transportation. First choice OR main choice
33. Count on getting where you need to go in a timely manner
34. Improves the quality of life

City Of San Marcos / City Council "Lunch and Learn" (con't)

Barriers to Achieving Vision

1. Money
2. Money
3. Collaboration – lack of cooperation
4. Lack of coordination
5. Lack of access to routes / frequency
6. There is not a feeling of safety while riding or waiting
7. Stigma – it's for poor people
8. Lack of cultural shift / education about transit
9. Inconvenient
10. Riding with college students (e.g. language)
11. Incompatible value systems with youth / elderly
12. Use of apps not part of older adults' skills
13. Marketing strategies
14. Cultural change to work with the schedule
15. Traffic and road size restrict the possibility of frequency
16. Lack of flexibility with federal funds
17. 2020 census

Support Achieving the Vision

1. Staff and City Council support alternative mobilities
2. City staff highly educated and knowledgeable about transit
3. CARTS – improving services, marketing
4. Future modeling of City growth is dependent on transportation alternatives - sidewalks, ADA
5. There is existing demand and there are riders
6. There is untapped demand
7. Community is progressive and supports multi-modal transportation and would use if efficient
8. City and University have common interests and want to solve [transportation] for the whole community
9. New buses with Wifi are sharp looking, cool
10. Rebranding is good
11. Hotels, outlet malls, Amazon - employment centers – want to participate in transit solutions
12. TXDOT and FTA money
13. Legislators
14. The Master Plan is going to be revisited in one year

Item Placed in the "Parking Lot" for Later Discussion

Image of transit

a. Only if no other means of transportation

City Of San Marcos / City Council "Lunch and Learn" (con't)

b. Relative size of community
c. Just not on regular resident's radar as a first choice for transportation
d. Enhancing people's income and employment possibilities

Participants

Jane Hughson, San Marcos City Council
Ed Mihalkanin, San Marcos City Council
Saul Gonzalez, San Marcos City Council
Kristy Stark, City of San Marcos
Stephanie Reyes, City of San Marcos
Collette Jamison, City of San Marcos
Lisa Prewitt, San Marcos City Council
Melissa Derrick, San Marcos City Council
Bert Lumbreras, San Marcos City Manager
Steve Parker, Assistant City Manager

Observed by:

Rodney Cobb, City of San Marcos
Oscar Hairell, City of San Marcos
Pete Binion, City of San Marcos

Meeting conducted by:

Hugh Kierig, KA Associates
Judith Kierig, KA Associates

Stakeholder Input Meetings
San Marcos Community Stakeholders
5:30 – 7:00 PM, June 12, 2018
Activity Center, City of San Marcos

Vision for Transit in San Marcos

1. Easily accessible (safely)
2. Stops are comfortable -- rain, sun protection
3. Residents have affordable options for getting to work. Transit stops are walkable distances from destinations
4. Hours of operation provide service for employers
5. There is special service for employment areas (as opposed to shopping)
6. Buses go to all neighborhoods
7. Outlet mall has service to support shoppers and employees
8. People want to live here because of easy access to employment
9. Transportation serves San Marcos and ETJ
10. Night areas are lighted
11. There are safe street crossings (plus ADA)
12. There are bike lanes and sidewalks
13. Star Park / Innovation Lab has bike lanes, sidewalks and transportation
14. Look at areas / unique areas to promote mobility
15. Everyone doesn't need their own car
16. Remote parking is served by transportation
17. Train traffic is not obstructing travel
18. Reliability
19. Everyone knows how to ride the bus and what is available
20. There is a tracking system with info about bus arrival
21. There is a bus every 15-minutes
22. ADA and seniors would have access to transportation for special events, especially City and Texas State events
23. There is access to childcare facilities
24. City requires developers to provide planning for transportation e.g. bike, bus, etc.
25. All neighborhoods connect with trails

Barriers to Achieving the Vision

1. Separation of the University and the community (Town/Gown)
2. Money
3. Size of streets – no bike lanes, traffic jams
4. Train traffic
5. Wonder World
6. The number of infrastructure items that have to be constructed
7. Bus is "low class," prefer car. Image – should be a good thing
8. Employer demand is unknown

City Of San Marcos / Community Stakeholders (con't)

9. Hear that service doesn't work for riders
10. People want instant access to transportation (such as the need to pick up a child unexpectedly)

Supports for Achieving the Vision

1. There are studies that have shown where foot traffic is. Also retail frequencies and travel patterns
2. Development of homes along and Hunter might support transportation density
3. Increased density of seniors could support transportation
4. Population in general is growing
5. Seniors and people in wheelchairs would use service
6. If University wants collaboration and partnership that is huge
7. City size is still small and planning is taking place as the growth is starting
8. There is City and Texas support for transportation

Participants

Cara Ryan, Greater San Marcos Partnership (GSMP)
Sandra Martinez, San Marcos Senior Citizen Advisory Board
Madalyn Webber, San Marcos Area Chamber of Commerce
Dr. Marianne Reese, San Marcos Senior Citizen Advisory Board
Sara Lee Meyers, San Marcos Council of Neighborhood Associations (CONA)

Observed by:

Rodney Cobb, City of San Marcos
Oscar Hairell, City of San Marcos
Pete Binion, City of San Marcos
Steven Herrera, Texas State University

Meeting Conducted by:

Hugh Kierig, KA Associates
Judith Kierig, KA Associates

Coordinated Transit Plan Executive Summary

The Phase I portion of the Coordinated Transit Plan Study focused on developing recommendations for the City of San Marcos' role as the direct FTA recipient and specific options for coordinating transit services between the City of San Marcos (City) and Texas State University (University). In August 2018, the City Council directed the City staff to initiate the process to become the direct recipient. This process is underway, and the City will officially be the direct FTA recipient on October 1, 2019. In the meantime, CARTS is still reflected as the direct FTA recipient during this transition period.

The Phase I report presented five model options to achieve a shared vision for coordinated service between the City and University in the San Marcos region. Three models were eliminated from consideration –

- **Model One: Do Nothing** – maintain current City and University transit systems. Eliminated from consideration for not fulfilling the vision of a seamless coordinated transit system.
- **Model Three: University Operates/City Purchases** – Eliminated due to City's desire to become and be the direct recipient.
- **Model Five: Formal Transit Authority** – Eliminated due to concerns regarding governance representation that could result in sole control of transit placed with a board.

The remaining two models, and locations where the similar, but not completely applicable to San Marcos, models are successfully applied, include –

- **Model Two: City Contracts / University Purchases** – the City of San Marcos establishes a federally compliant system and contracts with a third-party transit operation and the University purchases services from the City under this contract to meet university needs. An ILA between the City and University is needed to outline communications, route planning, shared responsibilities, and other pertinent shared activities.

  Examples of this model are City of Lafayette / Purdue University; City of Blacksburg / Virginia Tech University; Monongalia County / West Virginia University

- **Model Four: City and University Mutually Agreed Shared Coordination –** Maintain separate transit operations, preferably with the same federally compliant third-party transit operation, and formally agree, via an ILA, to shared coordination. In this model, both the City and University operations and maintenance would need to be federally compliant for both systems to be included in the regional calculation to obtain Small Transit Intensive Cities (STIC) funds.

  Examples of this model are the City of Lawrence / University of Kansas; City of Corvallis / Oregon State University; City of Muncie / Ball State University

Based on the review of these two models, the Project Team* recommended as the preferred implementation model in San Marcos an operating approach comparable to Model 4 in which the two systems will contract and operate their systems separately, agree to share federal operating and capital funds through a direct recipient (City) / sub-recipient (University) relationship, and coordinate these operations through an Interlocal Agreement between the two entities.

As a result of this choice, the City and University will jointly develop a Request for Proposal with the desired outcome being to identify a mutually approved third-party transit operator.

This contract will specify services that –

- Manage, supervise, and operate fixed route and ADA paratransit service;
- Provide vehicle maintenance and transit technology implementation, and;
- Provide options for marketing and communication services; customer service; ADA passenger certification, and; ridership data collection.

Concurrently, the City and University will develop an Interlocal Agreement that supports a coordinated transit operation to provide seamless access between City and University systems, is federally compliant, and maximizes the potential for new transit funding (STIC funds) to the region.

*Project Team
Steve Parker, Rodney Cobb, Oscar Hairell, Pete Binion, City of San Marcos
Nancy Nusbaum and Steven Herrera, Texas State University
Hugh E. Kierig, KA Associates

Detailed Background

The primary focus of the Phase I portion of the Coordinated Transit Plan Study was to assist the City of San Marcos in determining the advantages and disadvantages of being the direct recipient of Federal Transit Administration (FTA) operating and capital funds provided to the San Marcos region. In August 2018 the City Council authorized the City administration to initiate the designation of the City as the FTA direct recipient.

In addition to the direct recipient issue, it was an objective of both the City of San Marcos and Texas State University to move toward a seamless and federally compliant transit system in which passengers – University affiliated and general public – could access both City and University operated transit services; where fares or University ID's were transferable between both systems, and; that both the City and University work in concert to achieve access to both the community and campus and maximize the potential for new federal and state funds.

To that end, the Phase I report identified five operating models that could be employed to achieve this goal. The first, a "Do Nothing" model which would result in no change in the current operating divisions is not being given further consideration because it does not meet the coordination plan objectives. The third, University Contracts and City Purchases is not being given further consideration because the City prefers being the direct recipient. The fifth, a formal transit authority with joint representation, is not being given further consideration due to expressed local concerns regarding governance representation with the creation of a formal transit board.

The remaining two models follow, along with locations where they are currently successfully applied and each model's benefits and challenges. It should be noted that none of the examples are completely applicable to San Marcos and Texas State University. Many of the cities represented are larger than San Marcos or the universities larger or smaller than Texas State University. However, they do have one thing in common with both the City of San Marcos and Texas State University – as federally recognized "small urban" transit systems in university communities, they can utilize FTA Section 5307 operating and capital funds and all qualify for FTA Small Transit Intensive Cities (STIC) funds.

- **Model Two: City Contracts / University Purchases** – with this model, the City of San Marcos establishes a federally compliant system and contracts with a third-party transit operation and the University purchases services from the City under this contract to meet university needs. Conditions and process of this model include:

    - The City, as the direct recipient, is responsible for all federal and state compliance issues related to the execution of contracts, triennial reviews, civil rights coordination, and other transit issues.
    - The City, as the direct recipient, takes on the role of coordination with federal, state and regional agencies in the development and execution of funds directed to the region.
    - As the direct recipient, the City is the lead in processing the RFP through the development, comment, review, and contract negotiations process. The University has a collaborative and coordinating role in all elements of this process. Contractual issues that are of concern to both parties are addressed in the development of the RFP and implemented through the signed contract. Issues addressed in the contract may include but not be limited to:
        - Contact and communication between the City, the University, and the transit vendor;
        - Coordination between the City, University, and third-party transit vendor;
        - Both common and separate operations, maintenance, dispatching, and supervisory standards;
        - Marketing and social media roles and responsibilities;
        - Data collection and reporting;
        - Customer service expectations including responses;
        - Coordination of technology and its implementation;
        - Fare collection, sales and cash handling, and;
        - Expansion or contraction of City and/or University transit services.
    - The prime contract is executed by the City with the third-party vendor. An Interlocal Agreement between the City and the University is needed that defines a variety of roles/topics including but not limited to:
        - Defined "guiding principles" for a shared transit vision;
        - Agreement regarding joint and seamless access between University and "City" passengers and fares and fare collection/sharing;
        - Current operational needs and issues including duplicative routes, vehicle capacity, and frequency service needs;
        - Defined internal communication between all three parties;
        - Coordinating on route and other service planning;
        - Agreement on the use of federal and state funding, especially new funding that may come to the region;
        - Coordination on capital planning and implementation, and;
        - Implementing technology improvements.

    Locations where this arrangement currently exists in a similar circumstance –

    - **City of Lafayette (CityBus) / Purdue University**. CityBus is the operating name for Greater Lafayette Public Transportation Corporation (GLPTC), a municipal corporation established in 1972. As a division of local government, CityBus is led by

a Board of Directors, whose members are appointed by the mayors and city councils of Lafayette and West Lafayette.

- CityBus is a contracted partner with Purdue University for public transportation services. The "unlimited access" agreement gives Purdue students, faculty, and staff unlimited, fare-free access to the CityBus system.
- The value of the agreement is negotiated each year. CityBus has a similar relationship with Ivy Tech (Vocational-Technical Education Institution), which gives students and staff fare-free rides on CityBus.
- The area is a small urban designation with CityBus serving as the direct recipient for the UZA. The region qualifies for three STIC credits and receives $606,000 in STIC funds.

- **City of Blacksburg / Virginia Tech University.** Blacksburg Transit is a department of the Town of Blacksburg and the provider for public transit in the town and portions of the county. The system is directly operated by the Town of Blacksburg. Blacksburg Transit has recently expanded the bus fleet to meet demand of ridership.
  - Virginia Tech students have unlimited access to all Blacksburg Transit routes. Blacksburg Transit and the University negotiate annually for the University subsidy for the transit access.
  - All operations, planning, and data collection are conducted by Blacksburg Transit. Blacksburg Transit provides all ADA paratransit service.
  - The Town of Blacksburg is the direct recipient for the UZA which is a small urban system. The region qualifies for four STIC credits and receives $808,000 in STIC funds.

- **Monongalia Transit Authority (County agency) / West Virginia University.** A County Authority that operates the bus system directly and not through a third-party contractor. The Authority has a governing board appointed by the County Commission.
  - The University pays the transit authority a discounted price per trip for student, faculty, and staff access to all transit routes of the system. The University also purchases directly from the Authority inter-campus fixed route bus service at an hourly charge.
  - Morgantown is a small urban designee and the Authority is the direct recipient. The region qualifies for four STIC credits and receives $808,000 in STIC funds.

- **Benefits of Coordination Model Two**
  - Creates opportunities for increased FTA funding using combined ridership data;
  - Provides seamless access to transit for the University and community in which University students and employees would gain access to community routes and the general public would have access to increased hours from the University system;
  - Facilitates marketing, technology implementation, and route and capital planning including transit infrastructure improvements between the City and University;
  - With one overall contract providing the service for both the City and University, there will be economies of scale savings potential for both entities through a

single transit third-party operator providing operations and maintenance to both, and;
- Promotes better overall community transit by coordinating relationships between City staff, University staff, and the third-party contractor.

- **Challenges of Coordination Model Two**
  - Requires vigilant communication and cooperation between all parties;
  - In order to be federally compliant, on demand paratransit service will need to be extended in the late evening hours when buses on predominantly University routes are operating;
  - Program costs could increase, and;
  - Route planning and operational variations to transit service.

- **Model Four: The City and University Maintain Separate Systems and Mutually Coordinate Services –** in this model both the City and University maintain their traditionally separate, but federally compliant, transit systems and agree with an ILA between both parties to promote coordinated transit services for the region. While this model approach includes separate operating contracts, it does envision a jointly issued RFP in which mutual operating, maintenance and administrative issues may be addressed. As opposed to Model 2 where the City contracts and University purchases transit service, this model requires constant collaboration and a shared vision for a coordinated transit service. There does exist opportunities for the City to share federal operating and capital funds through a direct recipient / sub-recipient relation in which University could use FTA funds for operational or capital needs. Conditions and process of this model include:
  - The City, as the direct recipient, takes on the role of coordination with federal, state and regional agencies in the development and execution of funds directed to the region. As a sub-recipient, it would be expected that the City and University would develop a collaborative and supportive relationship regarding representation on regional, state, and federal transportation agencies relative to mutual planning, policy promotion, grant applications, and funding implementation.
  - The City, as the direct recipient, is responsible for all federal and state compliance issues related to the execution of contracts, triennial reviews, civil rights coordination, and other transit issues. As a sub-recipient, the University would similarly be responsible for federal and state compliance regarding any use of these transit monies.
  - Both the City and University develop separate, federally compliant operating contracts (preferably with the same vendor) through a jointly issued Request for Proposal. Even though there may be separate contracts, the joint RFP development still requires collaboration between the City and University.

    Shared coordination issues addressed in the contracts with the vendor(s) may include but not be limited to:
    - Coordination and communication between the City, University, and the third-party vendor;
    - Operations, maintenance, dispatching, and supervisory standards;
    - Marketing and social media roles and responsibilities;
    - Data collection and reporting;
    - Customer service expectations including responses;

  - Coordination of technology implementation;
  - Fare collection, sales and cash handling;
  - Expansion or contraction of either City or University transit services.
- Should there be a need for the development of separate RFP's, the City and University will separately assume the lead in processing their RFP through the development, comment, review and contract negotiation process. Collaboration between both parties is essential in the development of the other RFP. To promote a joint procurement process (and subject to procurement rules of the City and University), the RFP's should be concurrently circulated and reviewed.
- In order to be able to report ridership for the benefit of the region, the University enters into a federally compliant contract process and takes on a more active role to assure that policy and operational aspects of their contract are compliant, and data can be used. (Note: the regional office of FTA will need to determine how active a role the University will need to take for the University system ridership to be counted.)
- An Interlocal Agreement is developed between the City and University that defines a variety of roles/topics including but not limited to:
  - Defined "guiding principles" for a shared transit vision;
  - Agreement regarding joint and seamless access between University and "City" passengers and fares and fare collection/sharing, and use of federally funded vehicles on University funded routes;
  - Defined internal communication between all three parties;
  - Coordinating on route and other service planning;
  - Agreement on the use of federal and state funding, especially new funding that may come to the region, especially as it relates to direct recipient / sub-recipient roles;
  - Coordination on capital planning and implementation, and;
  - Implementing technology improvements.

Locations where this arrangement currently exists in a similar circumstance –

- **City of Lawrence / University of Kansas.** After operating two distinct transit system for seven years, both the City and University realized the value of coordinating through a Memorandum of Understanding (MOU). The City system is supported through a dedicated transit property tax with the University system funded through student fees. The MOU (ILA) outlines common interests in a coordinated system.
  - Equal access for University students and employees to the City system and public access to the University system.
  - Both systems share an operations and maintenance facility that was funded by the University with the City paying a rent. The City and University prepared a joint operations and maintenance RFP that resulted in a single third-party contractor.
  - The City and University agree to funding routes both separately with some routes operated through shared funding.
  - Agreed sharing of new federal and state transit funds to support existing and new transit services and capital purchases.
  - The City takes the role of direct recipient of federal and state transit funds. Both the City and University separately provide ridership data to the NTD that produces additional STIC funding. Through the combined NTD reports, Lawrence received $606,000 in STIC funds.

- **City of Corvallis / Oregon State University.** The City of Corvallis operates a public transit system for the entire community. The City system is fare free and financially supported through a Transit Operations Fee that is collected through water bills. The University operates a separate transit system for on-campus shuttles only and is funded through a student fee. Through an Intergovernmental Agreement that is renegotiated annually, the University contributes set amounts to the City transit operation. There is mutual access for University students and employees to the City system and public access to the University system.
    - Each system has separate third-party operations and maintenance contracts and separate operations facilities.
    - The University coordinates with the City on transit planning and services. The University does not report transit ridership data for use in determining STIC funding.
    - All capital funding is provided separately to meet the needs of each transit system.
    - The region is designated as a small urban area and the City takes the role of direct recipient of federal and state transit funds. The region qualifies for five STIC categories and receives $1,010,000 in STIC funds. STIC funding for this region is based on City system ridership only.

- **City of Muncie / Ball State University.** The City of Muncie operates the public transit system within the City including four of the 16 fixed routes to the University. The University operates a separate on-campus transit and paratransit system funded by student fees. Through an agreement between the City and University, students have unlimited access to the City system with ID.
    - Coordination between the City and University only includes shared use of campus bus stops.
    - The University does not report transit ridership data for use in determining STIC funding.
    - The region is designated as a small urban area and the City takes the role of direct recipient of federal and state transit funds. The region qualifies for three STIC categories and receives $606,000 in STIC funds based on City transit system ridership only.

- **Benefits of Coordination Model Four**
    - Both the City and University maintain the level of transit service to support their individual needs;
    - Shared features of both systems would be coordinated route and capital planning, marketing, transit technology and passenger amenities;
    - The City and University have the option to either maintain their own branding or consolidate the systems under one branding and logo, and;
    - Promotes better overall community transit by coordinating relationships between City staff, University staff, and the third-party contractor. Frequent communication meetings are critical to their success.

- **Challenges of Coordination Model Four**
    - In order to use Texas State University ridership data, the University system would need to re-bid the current contract to become federally compliant;

- On demand paratransit service would need to be provided during extended hours and should be addressed through the coordination ILA.
- Route planning and operational variations to transit service.
- There is no guarantee the City and University would have the same vendor thereby reducing potential cost "economies of scale" savings;
- For the implementation of a seamless system, separate branding and marketing may create confusion for City and University passengers; and
- Requires vigilant communication and cooperation between all parties.

Note that the common thread in how these models are implemented is universal transit access for university students and employees. Additionally, to be federally compliant, University routes need to be open to the public. For the San Marcos region, a major key to overall implementation success is being able to capture the student ridership for overall community benefit.

Based on these two model options, KA Associates and the Project Team recommends Model Four, where the City and University jointly issue a RFP that addresses individual operating issues but recognizes mutual transit needs and benefits. Additionally, this Model choice allows for the development of a direct recipient / sub-recipient relationship between the City and University in which federal and state transit funds may be shared to the advance of both systems.

Local Model Choice

Recently the Project Team, the City Manager, the Vice President for Finance and Support Services, and KA Associates met to discuss the various operating model options and transit management roles to move the two systems toward a common coordinated service. From this meeting the following conclusions were reached –

1. The City and University reached agreement to pursue a coordinated system in which the City and University develop and execute individual operating contracts with a single third-party transit operator. This involves:
   - The City and University jointly developing an RFP for the operation of a coordinated and seamless transit system in San Marcos and for Texas State University. Both the City and University would have administrative oversight over their own executed contracts.
   - The federally compliant contracts would at a minimum include the administration, supervision and direct operation of both fixed route and ADA paratransit service and vehicle maintenance.
   - The third-party contract would include options for the contractor to collect ridership data for reporting to federal and state agencies, marketing of both City and University transit services, onboarding of ADA passenger applications and certification, fare collection and security, customer services, implementation of common transit technologies for bus location, fare sales, etc. and other activities as directed by the contract. These other activities would be subject to the contract costs of these services compared to in-house operation.

2. The City and University agree to a direct recipient / sub-recipient role respectively for mutually determined shared use of federal, state, and regional funds available to the area. As the direct recipient, the City would take the oversight lead in ensuring compliance to all federal, state, and local regulatory requirements.

3. The City and University would share coordination with local, regional, state, and federal transportation organizations to promote benefits to the coordinated system.

4. Through an Interlocal Agreement, both the City and University collaboratively agree on issues to achieve the coordinated vision such as:
   - General guiding principles for the coordinated transit systems;
   - Passenger access agreements between the two systems;
   - Fare collection and revenue sharing;
   - Coordination for transit funding, especially new federal and/or state funds that could come to the region through combined ridership reporting;
   - Shared access to any discretionary capital funding including but not limited to buses, bus facilities, and passenger amenities;
   - Fixed route planning, shared route opportunities, and shared transfer points and other opportunities;
   - Coordinated customer service access and response;
   - Joint marketing and branding opportunities including schedules, bus locator technologies, social media;
   - Customer input / advisory arrangement;
   - Regularly scheduled communication and meetings;
   - Other coordination and operations issues as they arise;
   - Fuel purchasing arrangements, and;
   - Paratransit services.

Proposed City of San Marcos Transit Staffing Projections

In August 2018, the City of San Marcos agreed to take over the direct recipient role for the San Marcos transit operation. With that action, the City committed to new transit oversight responsibilities previously assumed by CARTS. While the San Marcos transit operation for FY 2018/2019 will continue to be operated by CARTS, the City, as the direct recipient, will be taking on many new administrative responsibilities including –

- Assurance that the San Marcos system is compliant with both Federal and State transit rules and regulations;
- Contract administration and oversight of the current (CARTS) and future third-party operator;
- Development of federal and state transit grants for both operations and capital, as well as submitting all required reports, and;
- Coordinate capital and operation planning with federal, state, and regional agencies.

In addition, as the community system operated by CARTS transitions from a regional operation to an independent transit system, the City will be responsible for the development of marketing and rebranding the San Marcos system. This will not only include graphic changes to the buses from the CARTS markings but also changes to marketing materials and graphics on bus stop signs, printed materials, and other marketing medium. The City may even wish to consider a change in the system name as a "new start" for a new management.

Staffing

In the recent past, CARTS has played the major role in providing direct management and marketing for all public transit in San Marcos. The recommended operating model suggests a different relationship between the City staff and a third-party operator. The transit vendor will continue to be responsible for day-to-day operations and management of the transit services as defined in the contract. However, the City staff will not only continue the transit oversight that has been undertaken in the past but also now take on a more direct transit role that extends to capital planning, grant administration, and a more direct relationship with federal and state funding agencies along with coordination with University staff on route planning, technology implementation, and marketing.

Because of these responsibilities, it is recommended that first-year full time City staffing consist of:

- **Transit Manager** with responsibility for overall contract administration, coordination on transit matters with the University and third-party vendor, oversight of the development and administration of transit grants to local, regional, State and federal agencies. As state, regional, and national transit associations are excellent management resources, this position should anticipate an active participation with these organizations. The Manager would as well serve as the local contact to the public regarding ~~for~~ transit issues.
- **Transit Specialist** who would take on the tasks of route analysis and planning, coordination with University planners, and coordination with marketing and communication.

As the transit administration within the City develops, it may be necessary to include an **Administrative Assistant** whose responsibilities may include administrative support and public / customer service. It is not anticipated that this position would be necessary during the first-year start-up for the City. All other support services needed for the City transit operations – human resources, finance, legal, procurement, etc. – may be provided through current City internal resources. These positions as well as City support services provided to the transit operation are eligible for grant reimbursement.

Recommendation

Based on the review of these two models, the Project Team* recommends Model 4, the City and University Maintain Separate Systems and Mutually Coordinate Services as the preferred implementation model in San Marcos. Additionally, the Project Team recommends that the University hold a sub-recipient role regarding the distribution of federal and/or state transit funds.

The material included in this document provides detailed information for a locally preferred coordinated model recommendation. It also identifies planning recommendations for the City of San Marcos regarding staffing considerations. Once the preferred model recommendation is endorsed by the City Council and University administration with direction from both entities to move towards implementation, the City and University should engage in the development of a combined RFP and development of the Interlocal Agreement. Elements of an ILA should include:

- Coordinated Transit Guiding Principles
- Fixed Route and Paratransit Services
- Fares and Fare Collection
- Capital Programming
- Sharing of New Funding
- Lost and Found Items
- Customer Services
- Information Technologies
- Marketing/Social Media/Advertising/Branding
- Interurban Service
- Maintenance and Future Passenger Amenities
- Federal Compliance by the University
- Collection of NTD Reported Data and Reporting Procedures by the University
- Shared Governance Opportunities and Collaborative Representation to Regional, State, and Federal Transit Organizations

ADDENDUM

- **Model Two Evaluation Criteria**
- **Model Four Evaluation Criteria**
- **Draft Timeline**

Model 2 Evaluation Criteria		
	City	**University**
Pros	• City has complete management over the system administration • Decision making for service and operational issues is within the City control • City recipient of additional University ridership statistics for grant funding enhancement	• University can continue to focus their dedicated funds to campus mobility needs • Potentially could minimize operational and administrative overhead – out of the bus operations business • Maintains mobility access for students, faculty, and staff • Third-Party Contractor assumes collection of University transit system performance statistics for federal reporting
Mutual Benefits	• Opportunities for additional federal funding exist • More incentive and opportunities for collaboration • Relationship and trust building between the City and University • Potential to eliminate duplication of routes to the same service areas	
Cons	• Potential for increased funding may result in the City having to increase local share to new grant funds • Community expectations for service may exceed what the City can afford to provide • Increased management and oversight	• Reduction in control over transit service decisions • Special event / special student need transit services are potentially limited • Ability to respond immediately to an unforeseen transit demand greatly reduced • Decision making for non-campus service needs outside the University control • Reduced influence in service decisions • Does not insure that non-campus service benefits the University • Representation on decision making board negotiated
Mutual Barriers	• Concern the City operator will serve the University's constituents as well as the current system does	
Notes	• **Supports the Vision by:** ○ Creates seamless transit system within the community ○ Viewed as a "community" system ○ Increased potential for new service areas, frequency, and hours of operation ○ Coordinated passenger amenities and infrastructure improvements ○ Promotes coordinated planning of route services • **Other Comments** ○ Very common approach to transit relationship between a community and university • **Examples of this model in City/University relationships include:** ○ Purdue University / City of Lafayette ○ Virginia Tech University / City of Blacksburg ○ West Virginia University / Mountain Line Transit – County Transit Authority	

Model 4 Evaluation Criteria		
	City	**University**
Pros	• Maintains control over the management and services to the citizens • With one third-party vendor, joint operating and maintenance with the University may create additional savings through economies of scale • Maintains a Community transit identity that is welcoming to local citizens • Promotes heightened coordination with the University • City has control over services to elderly and disabled constituencies	• Maintains control over the management and services to the University • With one third-party vendor, joint operating and maintenance with the City may create additional savings through economies of scale • Promotes heightened coordination with the City • Maintains a University transit identity • Maintains special event / special student service responsiveness • Through sub-recipient role, has the potential for new capital and operating funds
Mutual Benefits	• Provides opportunities for shared services and facilities • Provides potential for new federal operating and capital funds • New savings opportunities are created by elimination of duplicative services	
Cons	• Does not create a consolidated system with one identity	• University will need to accommodate fare collection and security • Imposes new federal and state administrative and operational requirements • Does not create a consolidated system with one identity
Mutual Barriers	• Requires concentrated and honest negotiation regarding shared responsibilities • May continue perception of two systems that are not coordinated	

Notes	• **Supports the Vision by:**
	  ○ Moving towards a seamless transit system within the community
	  ○ University students and staff have access to City system and citizens to University system
	  ○ Increased potential for new service areas, frequency, and hours of operation
	  ○ Promotes coordinated planning of route services and passenger amenities and infrastructure improvements
	• **Does not support the Vision by:**
	  ○ Beyond the mutually agreed upon shared operations and funding, direction of planning and vision for the transit system is narrow
	• **Other Comments**
	  ○ Requires mutual trust and cooperation between the City and University
	  ○ Promotes coordinated marketing and shared route service responsibility
	  ○ Provides a "success story" from which other collaborative programming can occur
	• **Examples of this model in City/University relationships include:**
	  ○ University of Kansas / City of Lawrence
	  ○ Oregon State University / City of Corvallis
	  ○ Ball State University / City of Muncie	

Project Timeline

- City Council Receive Report on Model Recommendation – February 5, 2019
- Texas State University Administration Receive Report on Model Recommendation – TBD
- Develop and Complete Coordinated Transit RFP – February to April 2019
- Develop City of San Marcos / Texas State University Interlocal Transit Agreement – February to April 2019

Further Actions

- Ratify City of San Marcos / Texas State University Interlocal Transit Agreement
- Issue Coordinated RFP
- Award Coordinated Transit Contracts
    - City of San Marcos Council
    - Texas State University Board
- Begin Coordinated Transit Service
- City of San Marcos Begin Full Direct Recipient Role